

September 24, 2019

Dear Santa Barbara County Board of Supervisors,

This letter is to express my interest in serving an additional term on the Board of Retirement for the Santa Barbara County Employees' Retirement System (SBCERS). I have very much enjoyed serving the public and the System's beneficiaries as a member of the Board of Retirement. As an independent appointed Board Member, I believe I add value to the Board by offering a private sector perspective in addition to my years in the financial industry.

Having over 15 years of experience working in the financial services industry uniquely positions me to make a significant contribution to SBCERS. In addition to my hands-on experience in the financial services industry, I have been a Board Member for Legal Aid Foundation of Santa Barbara County and have worked with YStrive, Rotary, and the Chamber. I also use to teach the Risk Management course and Retirement Planning course at UCSB Extensions in their Business Management & Law Program.

My educational background combined with my financial services experience and extensive involvement with community organizations; provide me with the experience and demonstrates the commitment I have to the community that contributes to my qualifications as a candidate to be a fiduciary for SBCERS.

Thank you in advance for considering me for another term. Please do not hesitate to contact me if you have any questions regarding my candidacy or qualifications.

Sincerely,

A handwritten signature in black ink, appearing to read 'Michael Vidal', with a large, sweeping flourish at the end.

Michael Vidal

**Profile**

Michael

First Name

Vidal

Last Name

[Redacted]

Email Address

[Redacted]

Street Address

[Redacted]

Suite or Apt

[Redacted]

City

CA

State

93101

Postal Code

**Indicate Supervisor Who Will Receive a Copy of your Application \***

Fifth District - Steve Lavagnino

[Redacted]

Primary Phone

[Redacted]

Alternate Phone

**Which Boards would you like to apply for?**

SANTA BARBARA COUNTY EMPLOYEES' RETIREMENT SYSTEM: Submitted

**Reference 1 Name**

Greg Levin

**Reference 1 Address**

[Redacted]

**Reference 1 Telephone**

[Redacted]

**Reference 1 Occupation**

ED SBCERS

**Reference 2 Name**

David Koppa

**Reference 2 Address**

[Redacted]

**Reference 2 Telephone**

[Redacted]

**Reference 2 Occupation**

Principal, Cornerstone Insurance Services

**Reference 3 Name**

Jennifer Smith

**Reference 3 Address**

[Redacted]

**Reference 3 Telephone**

[Redacted]

**Reference 3 Occupation**

ED Legal Aid Foundation of Santa Barbara County

**If you are now, or have ever been employed by the County of Santa Barbara, please list the department in which you worked, your title, and the dates you were employed.**

NA

**Interests & Experiences**

**Please explain why you are interested in serving, and what experience you bring to the Committee. Attach additional documentation as necessary.**

I am attaching a letter of intent.

**Give any information explaining qualifications, experience, training, education, volunteer activities, community organization memberships, or personal interests that bear on your application for the above Board, Commission or Committee. Attach additional documentation as necessary.**

I am attaching a letter of intent.

Upload a Resume

Please attach any additional documents here

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## Demographics

### Ethnicity

Hispanic

### Gender

Male



Date of Birth

### Education Completed:

BA in Business Economics and Sociology.

### Please Agree with the Following Statement

I agree that upon submission of this application all information provided is a matter of public record, and is subject to disclosure.

I Agree \*

# MICHAEL VIDAL

Santa Barbara, CA | [REDACTED]

## OBJECTIVE

To continue my commitment to my community by representing the 3<sup>rd</sup> District on City Council and to make a positive impact on that District and the City of Santa Barbara as a whole.

## EXPERIENCE

10/2012 – Present: Certified Financial Planner and Managing Partner,

*Cornerstone Wealth Management Services / Cornerstone Insurance Services, LLC*

- Provide comprehensive financial planning services & risk management solutions for small businesses and families.

01/2014-12/2015 – Adjunct Instructor, *University of California, Santa Barbara*

- Taught Risk Management and Retirement Planning courses for the Certified Financial Planning Department

05/2008 – 10/2012: Community Banking District Manager, *Wells Fargo*

- Lead over 140 team members and managed all community banking for the greater Santa Barbara area, including locations in Ojai, Montecito, Santa Barbara, Goleta, Buellton and Lompoc communities.

01/2004 - 05/2008: Store Manager, *Wells Fargo*

- Managed several banking locations from Ventura to Santa Barbara.

## VOLUNTEER WORK

03/2009 - Present: *Legal Aid Foundation of Santa Barbara*

Board of Directors; Past Officer and Committee roles including Secretary, Finance, Personnel, Fundraising and Events

01/2017 - Present: *Santa Barbara County Employees' Retirement System (SBCERS)*

Board Member

## EDUCATION

1998-2003: *University of California, Santa Barbara*, B.A., Double major in Business Economics and Sociology

## PROFESSIONAL LICENSES

Series 7 & 66, Health and Life Insurance License, Property & Casualty Insurance License, Real Estate Broker License and CERTIFIED FINANCIAL PLANNER™.