



CITY COUNCIL Agenda Item #19-022

Date: January 24, 2019

Consent Discussion X

SUBJECT: Appointment to the Montpelier Investment Committee

SUBMITTING DEPARTMENT: City Manager

RECOMMENDED ACTION: Make appointment to the Montpelier Investment Committee

STRATEGIC OUTCOME/INITIATIVE: Community Prosperity; Responsive and Responsible Government

EXPENDITURE REQUIRED: N/A

SOURCE OF FUNDS: N/A

LEGAL REQUIREMENTS: No legal requirements; Council makes appointments to fill vacancies on City Boards and Commissions

BACKGROUND INFORMATION: The Investment Committee is charged with reviewing and providing guidance to the Council on how best invest and manage funds that are donated or bequeathed to the City of Montpelier. Qualified individuals will have experience in investing, managing funds, or working with donated dollars.

The committee is seeking more members. We received one application, from Lou Cecere

SUPPORTING DOCUMENTS: Application

INTERESTED PARTIES: City Council; Applicant; Investment Committee; Finance Department

CITY MANAGER'S APPROVAL:

A handwritten signature in black ink, appearing to read "W. Hoffman", is written over the "CITY MANAGER'S APPROVAL:" label.

Jamie Granfield

From: noreply@civicplus.com
Sent: Wednesday, December 19, 2018 1:58 PM
To: Jamie Granfield
Subject: Online Form Submittal: City of Montpelier Boards & Commissions Application

City of Montpelier Boards & Commissions Application

APPLICATION FORM MONTPELIER CITY BOARDS AND COMMITTEES

Please use this form to express your interest in serving on a particular board/committee or commission. For information on our boards and committees, please visit <https://www.montpelier-vt.org/committeevacancies>. The Montpelier City Council makes appointments to board/committees at their regular meetings as vacancies occur. Completed applications are public documents and are subject to the Vermont Public Records Act.

The Montpelier City Council is committed to seeking diversity on all boards, committees and commissions, including but not limited to geographic, racial, gender, cultural, age, socio economic diversity. Montpelier residency for applicants is preferred but not required.

Name Louis A Cecere Jr

Email Address

Address

City MONTPELIER

State VT

Zip Code 05602-4205

Phone Number

Occupation Montpelier High School Planning Room Coordinator

Are you 18 years of age or older? Yes

Are you a registered voter in the City of Montpelier? Yes

Are you a resident of the City of Montpelier? Yes

How long have you been a resident of the City of Montpelier? 25 Years

Are you related to any elected City Councilor (including by marriage)?	No
Do you have any pending litigation against the City?	No
Name of City Board or Committee: (If applying for more than one board/committee, please list order of preference)	Investment Committee
Are you currently serving or have you served on any City board or committee? If so, please list and give approximate dates.	No

Please answer each question in as much detail as possible.

Education/Credentials:	BA, Communications Ramapo College of NJ NASD Series 6 & 63
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Professional activities that relate to this board/committee:	I have 30 plus years of business experience in the financial services industry. Through this experience I have gained a firm understanding of investment products with a concentration in mutual funds. For the past 22 years I worked with Sentinel Investments, a division of National Life, as a member of their Operations and Service management team.
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Community activities that relate to this board/committee:	It has been some time since I have been directly involved in a community committee. Many years ago I served on the Rec department's advisory board which assisted overseeing the department's budget and programs. My more recent community involvement has centered around youth sports, as my children became involved in both rec department programs and Main Street Middle School and Montpelier High School teams. Currently, I am assisting the MHS girls' tennis team and the MHS Scholars Bowl Club.
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Why are you interested in serving on this board/committee?	I believe Montpelier is a wonderful place to live, work, and to raise a family. It is encouraging to see us work to make decisions which will allow us to continue to be such a place in the future. However, there are many factors which make this goal difficult to achieve and I am hopeful my finance and business background can be of good use to Montpelier in reaching our goals.
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What talents or experience would you bring to the board/committee?

I will bring my finance experience to this role and my understanding of how to make sound decisions. My experience in being able to reasonably project earnings and work to forecast future potential will be helpful in this role. However, just as important for this role or any committee I have also learned one of the most important part of any team's success is about building relationships. Those relationships are at various levels of audiences and various levels of interest and understanding. I believe my ability to build relationships are some of my strongest skills and would allow me to help the committee achieve success.

Any other comments or information you wish to provide to the Mayor and City Councilors?

Field not completed.

Are you involved in any personal, professional or business pursuit that would affect your ability to make fair and impartial recommendations as a member of a City advisory board or committee?

No

ACKNOWLEDGMENT

I have read and accept the terms of board/committee appointment.

By e-signing this application, I certify that there are no misrepresentations, omissions or falsifications on this application.

Louis A Cecere Jr

12/19/2018

Submitted on:

Thank you for your interest in serving the City of Montpelier as a volunteer board or committee member. Your willingness to serve is greatly appreciated.

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