

PENSION REVIEW COMMITTEE BALLOT

Openings: Two (2) full terms ending 7/31/2025 (City Residency NOT Required)

Applications: Three (3) Applications

PLEASE INITIAL YOUR SELECTION

NAME OF APPLICANT	Comm. Simmons	Comm. Hayes - Santos	Comm. Arreola	Comm. Ward	Comm. Johnson	Comm. Saco	Mayor Poe
Matthew Barker							
Harvey Lewis (Seeking reappointment, BOT CFPF member)							
Angelo Witten (Seeking reappointment)							
READVERTISE FOR ADDITIONAL APPLICANTS							



City of Gainesville


Pension Review Committee

Board Details

Five (5) members; FIVE (5) YEAR TERMS. Created by Ordinance No. 31409; Reference Resolutions R-8338 (07/11/83); R-83-65 (10/03/83) and R-84-39 (06/04/84); and Amending Section 2(b) entitled Appointment and Membership by creating staggered five-year terms, eliminating ex-officio non-voting members, and clarifying that the Plan Administrator or designee acts as Secretary to the Committee (Resolution 001219 (05/14/01). City Residency NOT Required. SUCCESSFUL INVESTMENT AND ADVISORY EXPERIENCE REQUIRED.

The Committee shall assist the City Commission in carrying out its fiduciary responsibility as Board of Trustees of the City's pension funds by acting as an Advisory Committee on investment matters and Board referrals. The Committee shall also review investment policies and Investment Manager performance.

Overview

 **Size** 5 Seats

 **Term Length** 5 Years

 **Term Limit** 2 Terms

Additional

Advisory Board Website

Agendas and Minutes are located

upon request

Ordinance

Created by Ordinance No. 31409; Reference Resolutions R-8338 (07/11/83); R-83-65 (10/03/83) and R-84-39 (06/04/84); FL Admin Code Sect. 420 Ch. 67-37 and City Ord. 070872 (4/14/08)



City of Gainesville

Pension Review Committee

Board Roster



Angelo Witten

1st Term Oct 03, 2019 - Jul 31, 2020

Appointing Authority City Commission



Harvey Lewis

1st Term Jul 02, 2015 - Jul 31, 2020



Jonathan E Visscher

1st Term Nov 15, 2018 - Dec 01, 2023

Appointing Authority City Commission



David L Rader

1st Term Oct 03, 2019 - Jul 31, 2024

Appointing Authority City Commission



Christopher L Cleary

2nd Term Mar 21, 2019 - Dec 01, 2024

Appointing Authority City Commission

Memo

To: Board of Trustees for the General Employees' Retirement Plan
From: Budget & Finance, Pensions & Investments
Date: 9/04/2020
Re: Pension Review Committee Appointments

There are currently three applicants for two vacancies on the City's Pension Review Committee. The Pension Review Committee (PRC) is a citizen advisory committee that works with the City's Pensions & Investments staff to make investment related recommendations for the General Employees' Retirement Plan to the City Commission as the Board of Trustees for the General Employees' Retirement Plan. Appointment to the PRC requires relevant investment management or advisory experience.

Staff has worked in cooperation with the Pension Review Committee to make PRC appointment recommendations to the Board of Trustees since the PRC's establishment in 1983.

The original Pension Review Committee Resolution R-83-38 states that:

"Applicants to the Pension Review Committee shall have had successful investment experience and proven substantial advisory experience. The preliminary review of the applicants will be conducted by a screening sub-committee consisting of two members of the PRC. The Chairman or designee of the Pension Review Committee shall also be present during the screening review. Applicants will be interviewed by the screening sub-committee and will result in recommendations to the Board of Trustees. The Board of Trustees for the City's Pension Fund shall appoint the Pension Review Committee."

Over time, PRC applicant interviews were discontinued, and the applicant review process developed to include staff evaluation of PRC applications and resumes. PRC applications are discussed with the Pension Review Committee, and consensus on appointment recommendations is determined. Resulting PRC appointment recommendations are then submitted by staff to the Board of Trustees

Pensions & Investments staff consider the review of PRC applicants to be an important aspect of its Plan administration duties. Appointment of unqualified applicants to the Pension Review Committee may be viewed as a breach of the Board's fiduciary duty, and staff has a responsibility to assist the Board in avoiding such situations.

Staff and the Pension Review Committee have reviewed the current PRC applications and resumes. Based on their backgrounds and investment advisory experience, we recommend appointing the following applicants:

Harvey Lewis – Mr. Lewis currently serves on the City's Pension Review Committee and the Board of Trustees for the Police Officers' and Firefighters' Retirement Plan, and has extensive experience serving on various Florida municipal pension boards and committees advising on the investment of pension plan assets.

Matthew Barker – Mr. Barker is a FINRA licensed investment advisor with significant professional investment management experience.

While we appreciate the other applicant's interest in serving on the PRC, they do not appear to have the investment management experience necessary to make investment recommendations related to the General Employees' Retirement Plan. We therefore cannot recommend the following applicant:

Angelo Witten – Despite having FINRA investigator experience, Mr. Witten has no relevant investment management or advisor experience. He is also a City employee and General Pension Plan member. The Pension Review Committee is a citizen advisory committee, intended to include citizens with professional investment advisory experience. The PRC was never intended to include City employees or Plan members, and until Mr. Witten's partial term appointment in 2019, it never did. There is a separate Pension Advisory Committee that is comprised of City employees & Plan members, which would be more appropriate for Mr. Witten's participation.

Profile

View current Advisory Board and Committee openings [online](#).

	Matthew		Barker	
Prefix	First Name	Middle Initial	Last Name	Suffix

matt@cornerstone-fg.com

Email Address

1818 SW 188th Street	
Street Address	Suite or Apt

Newberry	FL	32669
City	State	Postal Code

In what city district do you live? To find your district visit: <https://tinyurl.com/yxd2kvwn> *

☒ I do not live in Gainesville

Mobile: (352) 318-8614	Business: (352) 378-7456
Primary Phone	Alternate Phone

Primary Phone Type

☒ Cell

Alternate Phone Type

☒ Office

Cornerstone Financial Group	Wealth Advisor
Employer	Job Title

Which Boards would you like to apply for?

Pension Review Committee: Submitted

PLEASE NOTE: You may only apply for two (2) City Advisory Boards/Committees each application cycle. A person may only be appointed to two (2) City Advisory Boards/Committees.

Question applies to Pension Review Committee

The Pension Review Committee has 2 openings for full terms ending 7/31/2025.

Do you claim any exemption to public record disclosure pursuant to FLA. STAT. Section 119?

☐ Yes ☒ No

If yes, please submit a detailed explanation of exemption.

Interests & Experiences

Question applies to Pension Review Committee

Why are you interested in serving on the Pension Review Committee?

To apply my knowledge as an independent financial advisor to help best serve the benefactors of the pension plan. It is my goal to provide the most accurate and truthful advice to the commission so they can make the correct long term decisions for the pension plan and its participants. This also will allow me to do my small part in bettering the community in which I live.

Question applies to Pension Review Committee

How many terms have you served on this board or committee previously?

0

Members of all City of Gainesville Advisory Boards and Committees must only serve two (2) consecutive terms, except for the City Plan Board, Development Review Board and Historic Preservation Board.

[MatthewBarkerResume.doc](#)

Upload a Resume

Please upload a file

Demographics

Are you a City of Gainesville Employee?

☐ Yes ☒ No

Are you a City of Gainesville Intern?

☐ Yes ☒ No

Are you currently on a City Advisory Board/Committee?

☐ Yes ☒ No

If yes, which Advisory Board/Committee?

Matthew D. Barker

1818 SW 188th Street

Newberry, FL 32669

352-318-8614

matt@cornerstone-fg.com.com

Employment History

Wealth Advisor

Aug. 2006 - Present

Cornerstone Financial Group, Gainesville, FL

- Advise individual & corporate clients daily to provide them with the best holistic financial & tax planning solutions available for their individual & company needs
- Perform investment analysis and produce product comparisons for clients
- Manage investors assets and corporate retirement accounts

Accounting Assistant

May 2005 – Aug. 2006

Santa Fe Ford, Alachua, FL

- Managed all Accounts Payable
- Assisted with Accounts Receivable processing
- Assisted with the production of a cash flow summary every morning
- Input accounting and financial data into the AutoSoft database
- Processed all invoices and balanced all car deals
- Assisted with payroll by computing the hours on employee time cards

****More employment information available if needed.****

Education

FINRA Licensed Series 7 & 66 Representative

September 2009

State of Florida, Life & Variable Annuity License

May 2009

Bachelor of Science, Business Administration

December 2010

University of Florida, Gainesville, FL

Associate of Arts in Accounting

Aug. 2005 – Dec. 2007

Santa Fe Community College, Gainesville, FL

- Inducted into SFCC Hall of Fame
- Recognized as 1 of 2 outstanding graduates Fall 2007

Activities & Accomplishments

- Prior Board Member and Past President for Ronald McDonald House Charities of North Central Florida
- Recognized as one of Gainesville's 40 Under Forty
- SFCC Student Body President April 2006 – April 2007
 - Supervised the budget allocation process
 - Supervised and delegated work to a 12 person executive cabinet
 - Performed speeches on tuition increase, lobbying issues, parking decals, and motivational topics at Graduation
- Team Captain & Committee Member for Relay for Life, American Cancer Society
- Assistant Coach for recreational baseball team

Profile

View current Advisory Board and Committee openings [online](#).

Mr	Harvey	A	Lewis	
Prefix	First Name	Middle Initial	Last Name	Suffix

lewisfl@aol.com

Email Address

14120 NW 15 Lane	
Street Address	Suite or Apt

GAINESVILLE	FL	32606
City	State	Postal Code

In what city district do you live? To find your district visit: <https://tinyurl.com/yxd2kvwn> *

☒ I do not live in Gainesville

Home: (352) 363-6044	Mobile: (904) 468-0274
Primary Phone	Alternate Phone

Primary Phone Type

☒ Home

Alternate Phone Type

☒ Cell

Retired	
Employer	Job Title

Which Boards would you like to apply for?

Pension Review Committee: Submitted

PLEASE NOTE: You may only apply for two (2) City Advisory Boards/Committees each application cycle. A person may only be appointed to two (2) City Advisory Boards/Committees.

Question applies to Pension Review Committee

The Pension Review Committee has 2 openings for full terms ending 7/31/2025.

Do you claim any exemption to public record disclosure pursuant to FLA. STAT. Section 119?

☒ Yes ☐ No

If yes, please submit a detailed explanation of exemption.

I am a retired Firefighter, and my personal information is protected.

Interests & Experiences

Question applies to Pension Review Committee

Why are you interested in serving on the Pension Review Committee?

I am currently serving and completing my first term. I would like to be reappointed for another term.

Question applies to Pension Review Committee

How many terms have you served on this board or committee previously?

One

Members of all City of Gainesville Advisory Boards and Committees must only serve two (2) consecutive terms, except for the City Plan Board, Development Review Board and Historic Preservation Board.

[Pension_resume_2020_reappointment_Pension_Review.docx](#)

Upload a Resume

Please upload a file

Demographics

Are you a City of Gainesville Employee?

☐ Yes ☒ No

Are you a City of Gainesville Intern?

☐ Yes ☒ No

Are you currently on a City Advisory Board/Committee?

☒ Yes ☐ No

If yes, which Advisory Board/Committee?

General Employees Pension Review Committee AND Consolidated Police and Fire Pension Board

Harvey A. Lewis
14120 NW 15 Lane
Gainesville, FL 32606
352-363-6044
lewisfl@aol.com

June 12, 2020

To Whom It May Concern:

My name is Harvey Lewis. I moved from Fernandina Beach, Florida to Alachua County in July 2013. I was a Broward County, Florida resident for more than 45 years before moving to Fernandina in 2001. I was employed by the City of Fort Lauderdale Fire Department for over 27 years and retired as a Lieutenant in 2000.

In 1989, I was an elected Fire Department representative to the Fort Lauderdale Police and Fire Retirement System. I served for 9 years as Trustee, Vice Chairman, Chairman, and Acting Administrator. This system currently serves over 1,000 active and retired members.

I have been a panelist on the subjects of Pension Administration, Soft Dollar Accounts, and Drop plans at both state and national pension conferences. From May 2000 to December 2001, I served as the elected civilian board member to the Cooper City Police Retirement System in Cooper City, Florida.

I have been a member of the City of Gainesville General employee pension review committee since 2015. I am a certified Public Pension Trustee.

Currently, I am completing one term as a member of the City of Gainesville, FL Pension Review Committee, and I was recently elected by the Consolidated Police and Fire Pension Board as their fifth member.

I believe that my continuation as a member on the Gainesville Pension Review Committee would be beneficial to the members and sponsor.

Therefore, I respectfully request that I be considered for reappointment to the City of Gainesville Pension Review Committee.

Harvey A Lewis

Profile

View current Advisory Board and Committee openings [online](#).

	Angelo		Witten	
Prefix	First Name	Middle Initial	Last Name	Suffix

wittena.gnv@gmail.com
Email Address

9216 NW 23rd Lane	
Street Address	Suite or Apt

Gainesville	FL	32606
City	State	Postal Code

In what city district do you live? To find your district visit: <https://tinyurl.com/yxd2kvwn> *

☒ I do not live in Gainesville

Mobile: (240) 876-2651	Home:
Primary Phone	Alternate Phone

Primary Phone Type

☒ Cell

Alternate Phone Type

None Selected

GRU	Fuels Analyst
Employer	Job Title

Which Boards would you like to apply for?

Pension Review Committee: Submitted

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Question applies to Pension Review Committee

The Pension Review Committee has 2 openings for full terms ending 7/31/2025.

Do you claim any exemption to public record disclosure pursuant to FLA. STAT. Section 119?

☐ Yes ☒ No

If yes, please submit a detailed explanation of exemption.

Interests & Experiences

Question applies to Pension Review Committee

Why are you interested in serving on the Pension Review Committee?

I have enjoyed serving the partial term that began October 2019. In that time, I have attended all meetings and have begun to appreciate the work done by the professional staff and the other advisory board members. These meetings are full of investment jargon that can act as a bar to prevent the public from understanding what is being discussed. My goal is to ensure that the needs of the GRU pension are being served by identifying when risks are misunderstood or when there is a potential for group-think.

Question applies to Pension Review Committee

How many terms have you served on this board or committee previously?

Partial term

Members of all City of Gainesville Advisory Boards and Committees must only serve two (2) consecutive terms, except for the City Plan Board, Development Review Board and Historic Preservation Board.

[Investigations_resume.pdf](#)

Upload a Resume

Please upload a file

Demographics

Are you a City of Gainesville Employee?

☒ Yes ☐ No

Are you a City of Gainesville Intern?

☐ Yes ☒ No

Are you currently on a City Advisory Board/Committee?

☐ Yes ☒ No

If yes, which Advisory Board/Committee?

Pension Review Committee

Angelo Witten

Compliance and Investigations Professional

Angelo Witten

2563 NW 97th Dr. Apt. 207
Gainesville, FL 32606

c: (240) 876-2651
wittena.gnv@gmail.com

Professional Summary

Successful compliance professional with over 18 years experience of conducting investigations and preparing written dispositions describing financial fraud and rule violations. Collaborated with attorneys to achieve positive results in settlement negotiations and litigation. Conducted over 60 on-the-record interviews.

Experience

FINRA / Analyst Investigator

October 2000 - June 2018, Rockville, MD

Led investigations into issuer fraud, broker/dealer fraud, and bond pricing schemes related to violations of FINRA Rules, MSRB Rules and SEC Rules and Regulations. These investigations involved intensive document and email review and analysis, interviews of firms and customers, and collaboration with other team members.

Worked closely with external parties and their counsel to collect relevant evidence of violations.

Developed cases based on hotline tips.

Managed a docket of 30 reviews leading them from initiation to disposition, as well as taking over cases from other team members.

Maintained current information on rule changes, relevant case law and compliance trends and shared information with team members.

Responsible for mentoring and on-boarding new team members.

Education

American University - Washington College of Law / JD

August 1997 - May 2000, Washington, DC

Student Attorney in the Women and the Law clinic

Health Law and Managed Care Seminar

University of Kentucky / MBA

August 1996 - August 1997, Lexington, KY

University of Kentucky / BS in Communication

August 1993 - August 1996, Lexington, KY

Affiliations

State Bar of Maryland, Member since December 2000