



CITY OF TAMARAC APPLICATION FOR FIREFIGHTERS AND POLICE PENSION BOARD APPOINTMENTS

Service on an advisory Board or Committee provides citizens with an opportunity to help shape future policy and strategic direction for the City of Tamarac. Tamarac residents are cordially invited to apply for appointment by the City Commission to a Board or Committee. Advisory board and committee members are voluntary positions and serve without benefit of compensation.

Please check Boards/Committees for which you wish to be considered:

- ☒ Pension Board – Firefighters
☒ Pension Board – Police

Application is for: ☐ Reappointment ☒ New appointment

PERSONAL:

Name: David W Mountford Telephone Number: 954.294.5212

Home Address: 7820 Banyan Terrace Zip Code: 33321

Length of Residence in Tamarac (If applicable) 15 Years Months

Length of Time as Business Person in Tamarac (If applicable) Years Months

E-Mail Address: davidw@witmanpensionconsulting.com

Development/Section Name and Number: Woodmont Estates

Commission District Number: 4 Voting Precinct Number: 4

EDUCATION:

Name and location of High School: Plantation High School, Plantation Florida

College (if appropriate):

Years Completed: Degree:

Field of Study:

Other professional or technical training (Name of school, course name, etc.):

CRPS - Chartered Retirement Plans Specialist - College for Financial Planning
AIF - Advanced Investment Fiduciary

EMPLOYMENT:

Current or most recent employer: Witman Pension Consulting

RECEIVED
CITY OF TAMARAC
CITY CLERK

2019 DEC 20 AM 9:50

Address: 11555 Heron Bay Blvd., Suite 200 Coral Springs, FL 33076

Position: President

Years of Service: 6

Duties: Pension Design - Documents and Compliance

OTHER QUALIFICATIONS:

Please provide a brief statement outlining why you wish to potentially serve on the applicable advisory boards and/or committees selected. In addition, please feel free to attach a copy of your resume or vita (optional):
Want to give back to the Community with knowledge concerning the Pension Arena. I have been in the Retirement Services Industry for 30 years. I have worked for Wall Street Firms - J&W Seligman now Columbia Threadneedle Funds - Oppenheimer Funds now Invesco and NYLIM - Mainstay Funds in the Retirement Wholesaler and DCIO capacities. Completed advanced Fiduciary Courses as well.

MEMBERSHIPS:

Completion of this section is optional. The information will be helpful to the press if you are appointed; however, it is not a prime factor in making appointments.

Tamarac Organization

Years Member

Office Held (If any)

Outside City of Tamarac

ACKNOWLEDGMENT

I understand that in accordance with the Florida Sunshine Law, this information will be posted for public review and I waive any objection to such publication.

I understand that appointment to any of the positions indicated above is a voluntary service, with no compensation or benefits.

If appointed, I agree to faithfully and fully perform the duties of my office, will make every endeavor to serve my full term, and will comply with all laws or ordinances of the City of Tamarac, Broward County and the State of Florida, particularly those pertaining to the conduct of public office and related financial disclosure requirements, if applicable to my position. I further agree to take the applicable statutory oath. I understand that if appointed, I must take the oath of office prescribed in the Florida Statutes.

Section 2-56 of the Tamarac Code provides each member of a board or committee of the City of Tamarac shall be a resident of the city. Failure to be a resident of the city shall result in forfeiture of the position on the board or committee. This section does not apply to staff appointed to a board, committee or commission as part of their work responsibilities. At their discretion, the Tamarac City Commission may waive the requirements of this section.

eSigned via SeamlessDocs.com
David Newman Mountford
Key: 660c78d0771f10d492117400537765c7

Signature of Applicant

12/19/2019

Date

ADDENDUM TO ADVISORY BOARD AND COMMITTEE APPLICATION FORM

Applicant Name: David W Mountford

1 Do you have any relatives presently employed by the City of Tamarac? No

If yes, please state names and City departments/divisions: _____

2 Are you aware of any potential conflict of interest that may arise from your serving on City of Tamarac advisory boards and committees? No **If yes, please explain:**

3 Do you presently have monies owed to the City of Tamarac which are delinquent?
If yes, please explain: No

4 Do you have any pending code violations relative to property owned by you within The City of Tamarac? If yes, please explain: No

5 Do you have any existing violations relative to other City codes? No

If yes, please list: _____

6 Have you ever been convicted of a crime? NO

If so, please explain:

NAME: David W Mountford

DATE: 12/19/2019

APPLICANT TRAINING AND EXPERIENCE

Please describe your experience in managing an investment portfolio and/or hiring and overseeing investment managers to include number of years' experience in each area.

In my early Career I handled Investment Portfolio's for my Retirement Plan Clients. Was responsible for putting together Investment Portfolio's to satisfy Fiduciary Compliance utilized Fi360 and other Industry Tools. I have wholesaled to the Top Wire house and National Firms in the Retirement Sector helping build Portfolio's and tracking success of the portfolios. This has been over a 25 year period

Please describe your experience in the insurance and/or money management industries to include number of years' experience in each area.

Insurance and Variable Annuity Licensed since 1992

FINRA Series 6-26-63 licensed for 27 years - I have let these licenses expire since I'm, not handling money anymore

Wholesaled Retirement Platforms and Investments with various firms over a 15 year time-frame

Please describe the amount and type of experience you possess in administering a pension or retirement plan.

For the past 6 years I have my own TPA Firm that provides Legal Documents and Administrators - 401(k) PS Plans - 403(b) Plans - 457(f) Plans and both Defined Benefit and Cash Balance Defined Benefit Plans - My firm currently does the Compliance and Document work for 50+ Plans

List any education and training you have in the above areas:

APA - Advanced Pension Administrator Courses - working on this designation currently

AIF - Advance Investment Fiduciary

CRPS - Chartered Retirement Plans Specialist

Are you able to meet during a weekday once a month?



Yes

No

Are you able to attend training seminars once or twice yearly for 2 or 3 days each?



Yes

No

Are you willing to complete and submit State-required financial disclosure forms?



Yes

No