SPEAKER BIOGRAPHIES

Fundamentals of Public Funds Investing January 28–29, 2026 | Costa Mesa, CA

BRET BLACK

Financial Manager
Eastern Municipal Water District
Perris, CA

Bret Black is the Financial Manager at Eastern Municipal Water District, where he oversees treasury, debt, and special funding. Mr. Black previously served as Chief Financial Officer at Strata Credit Union and Principal Treasury Investment Officer for Kern County, managing the county's $5 billion investment pool and banking services. Mr. Black background includes municipal finance, investment strategy, executive leadership, debt management, and asset/liability management.

BEN FINKELSTEIN, CFA

Managing Director
Hilltop Securities Inc.
Dallas, TX

Ben Finkelstein is a managing director at Hilltop Securities Inc. He brings over 30 years of experience and dedication to public funds investing. He is a Chartered Financial Analyst (CFA) holder and author of "Politics of Public Fund Investing - How to Modify Wall Street to Fit Main Street."

PETER GARGIULO

Senior Director
Fitch Ratings - Funds & Asset Management
New York, NY

Peter Gargiulo is a Senior Director within Fitch Ratings' Funds and Asset Management Group. In his current role, Mr. Gargiulo is responsible for assigning and maintaining ratings, developing rating methodologies, and publishing research for fixed income funds, closed-end fund leverage, and alternative investment fund finance. Prior to joining Fitch, Mr. Gargiulo worked at Kroll Ratings and Standard & Poor's in various analytical roles, covering fixed income funds and private and public placement fund leverage transactions, broadly. Mr. Gargiulo has his Bachelor of Arts in Psychology from Loyola College in Maryland.

STEVEN GOODMAN-LEIBOF

Investment Administrator
East Bay Municipal Utility District
Oakland, CA

WILLIAM (WILL) GOLDTHWAIT

Client Portfolio Manager
State Street Investment Management
Boston, MA

Will Goldthwait is a Client Portfolio Manager on the cash and fixed income investment team at State Street Investment Management. He is responsible for the communication of investment strategy and performance to clients, consultants, and prospects. He covers multiple sectors and vehicles, including both active and indexed fixed income.

Prior to joining State Street Investment Management in 2014, Mr. Goldthwait spent time on both the advisory and brokerage side of the business. He was part of Royal Bank of Scotland's Fixed Income Sales team and Merrill Lynch's Money Market Sales team. Prior to Merrill Lynch, Mr. Goldthwait worked as a portfolio manager and fixed income trader for Columbia Management and Fleet Investment Advisors.

ANGELICA (ANGEL) HERNANDEZ

Deputy Executive Director
California Debt and Investment Advisory Commission
Sacramento, CA

Angelica Hernandez is the Deputy Executive Director of the California Debt and Investment Advisory Commission (CDIAC). Over the past 18 years, Ms. Hernandez has held various positions within CDIAC including Manager of the Policy Research Unit and Manager of the Technical Assistance Unit. Prior to her time at CDIAC, she was a staff loan officer with the California Infrastructure and Economic Development Bank.

Ms. Hernandez was instrumental in the development of the California Debt Financing Guide interactive application and CDIAC’s Elected Officials Training modules. As the manager of the Policy Research Unit, she managed researchers who are focused on socially responsible investing for public agencies, climate change risk disclosures, and green bonds. During her time at CDIAC, she has participated in numerous projects, including the recently published *California Debt Financing Guide*, the annual update to the *Local Agency Investment Guidelines* (LAIG), and she wrote a three-part series on public-private partnerships.

Ms. Hernandez served as a member of the Sacramento County Treasury Oversight Committee for 16 years.

DEBORAH HIGGINS

President
Higgins Capital Management, Inc.
La Jolla, CA

Deborah Higgins has 40 years of experience in institutional fixed income, the last 29+ years as the fixed income trader for Higgins Capital. She specializes in public agency clients. Ms. Higgins remains active in supporting public agencies by serving on the Investment Advisory Committee for the City of San Diego, the California Municipal Treasurers Association (CMTA) Investment Policy Certification Committee, and the CMTA Education Committee. She continues her work on CDIAC's LAIG annual review as well as serving as frequent speaker for CDIAC, California Association of County Treasurers and Tax Collectors (CACTTC), and CMTA education. Ms. Higgins holds the following FINRA licenses: series 7, 63, 65, 24, and 53.

STEVE HUNTLEY

Senior Portfolio Strategist
Chandler Asset Management, Inc.
San Diego, CA

Steve Huntley joined Chandler in March 2025 as a Senior Portfolio Strategist. Mr. Huntley's responsibilities include maintaining relationships with clients and helping guide their portfolios through varying market cycles.

Prior to joining Chandler, Mr. Huntley served as the Director of Finance and Administration at the City of Farmersville in Central California while holding multiple leadership roles in the broader financial industry. Mr. Huntley served on the Board and the Executive Committee of Central San Joaquin Valley Risk Management Authority (CSJVRMA) for more than a decade, including a term as President from 2020 to 2022. Mr. Huntley also served on the board of the California Affiliated Risk Management Authority (CARMA, an excess liability joint powers authority) from 2019–2025, and helped found CARMA's Captive Insurance Company, California Affiliated Risk Management Authority Captive (CARMAC). Mr. Huntley has six years of private sector investment experience from Capital Group and Cambridge Investment Research.

Mr. Huntley graduated from Biola University with a B.S. in Business Administration Management. He holds the FINRA series 65 license, the Certified Public Finance Officer (CPFO) designation, and the Senior Certified Professional through the Public Sector HR Association (PSHRA-SCP). When Mr. Huntley isn't assisting clients, he enjoys hiking, camping, and snowshoeing with friends and family and visiting national parks (nearly 30 and counting).

JOHN (JJ) JOHNSON

Assistant Auditor-Controller/Treasurer/Tax Collector
San Bernardino County
San Bernardino, CA

John Johnson was appointed Assistant Auditor-Controller/Treasurer/Tax Collector (ATC) in 2022 and is responsible for the management and oversight of ATC's Administration, Information Technology, Treasurer Divisions, and the SAP Center of Excellence. Prior to his appointment, Mr. Johnson held the position of Chief Deputy Treasurer where he directed the activities for the County's investment and cash management units. Prior to joining the County in 2004, Mr. Johnson worked in the banking and securities industry as a financial advisor and registered securities representative. He has over 30 years of experience providing accounting and financial services in the private and public sectors.

Mr. Johnson is a graduate of the University of Southern Mississippi where he earned a Bachelor of Science in Business Administration. He is an active participant in the California Association of County Treasurers and Tax Collectors (CACTTC), California Municipal Treasurers Association (CMTA), and the Investment Managers of Public Agencies Council (IMPAC). He also serves on the County's Defined Contribution and Debt Advisory Committees and is Alternate Ex Officio Member on the SBCERA Board of Retirement. Mr. Johnson is a current Life Member and Past Distinguished President of the Optimist Club of Redlands and is a Past President of the Inland Empire Chapter of the Juvenile Diabetes Research Foundation.

JORDAN KAUFMAN

Treasurer-Tax Collector
San Bernardino County
San Bernardino, CA

Jordan Kaufman is currently in his third term as the elected Kern County Treasurer-Tax Collector, with fiduciary responsibility over the $7 billion Treasury investment pool and annually collecting over $1.5 billion in local property taxes. Mr. Kaufman is also the Plan Administrator for the $850 million deferred compensation plan for County employees. Before being elected, Mr. Kaufman was the Assistant Treasurer-Tax Collector since 2006. Prior to 2006, he spent over a decade in the County Administrative Office, where he performed budget and policy analysis and was involved in the issuance of various types of municipal bonds for the County.

Mr. Kaufman is the Treasurer and past Chairman of the United Way of Central Eastern California. He is also the Trustee and past Chairman of the Kern County Employees Retirement Association (KCERA), the Vice President of the California Asset Management Program (CAMP) investment pool Board of Directors, the Treasurer of the Boy Scouts of America Southern Sierra Council, the past Adjunct Professor at the California State University Bakersfield, the Vice President of the State Association of County Retirement Systems (SACRS), and a member of the Downtown Bakersfield Rotary Club. Mr. Kaufman has a Bachelor of Science degree in Industrial Technology from Cal Poly San Luis Obispo, and lives in Bakersfield with his beautiful wife of 25 years and their four children.

JASON KLINGHOFFER, CFA

Principal
MaxQ Analytics
Irvine, CA

Jason Klinghoffer lives in Irvine, California with his wife Courtney and son Everett. He is a former United States Marine who began his professional career nearly 20 years ago working as a Portfolio Analyst and Fixed Income Trader for an institutional brokerage team specializing in state and local government investing. His love and appreciation of technology can be traced back to his teenage years where he ran multiple small businesses specializing in personal computers, networking, server infrastructure, and video conferencing.

Mr. Klinghoffer started developing MaxQ Analytics in 2015 as a tool to help state and local government portfolio managers make informed and calculated decisions about investing. He specializes in addressing the philosophical, political, and analytical complexities of public fund portfolio management. He has been a guest lecturer and speaker at numerous national and state conferences, educational seminars, and advisory board meetings focused on public fund investing. Mr. Klinghoffer holds the Chartered Financial Analyst (CFA) designation from the CFA Institute and is an active member of the CFA Society of Orange County.

DAVID MAURICE

Investment and Debt Officer,
Office of the Auditor-Controller-Treasurer-Tax Collector
County of Sonoma
Santa Rosa, CA

David Maurice is currently the Investment and Debt Officer for the County of Sonoma. Sonoma County's Investment Pool is approximately $4 billion and services over 100 participants, mostly statutory members. There are 48 school districts in the county, and they are the single largest category of participants.

Prior to joining the county, Mr. Maurice managed the US dollar-denominated liquidity buffer for Barclays Bank, PLC, managing approximately $25 billion in high-quality liquid assets to meet the Bank's Basel III liquidity reserve requirements.

Mr. Maurice previously was a Senior Portfolio Manager for Norges Bank Investment Management, responsible for $80 billion in US & Canadian dollar investments for the Norwegian Sovereign Wealth Fund across rates/agencies/supra-nationals & sovereigns, as well municipals, mortgages, ABS, CMBS and covered bonds.

Mr. Maurice is a Chartered Financial Analyst. He holds a PhD in Theoretical Chemistry from the University of California (Berkeley), and a B.S. from Harvey Mudd College.

SUSAN MUNSON

Managing Director - Fixed Income Sales
Academy Securities, Inc.
Irvine, CA

Susan Munson has more than 30 years of experience in the fixed income markets serving institutional and middle-market accounts, with an emphasis on public agency clients. In addition to her sales and advisory experience, Ms. Munson has also been actively involved in fixed income education, including the CMTA Education and Certification Committee, for the past 15 years. Ms. Munson maintains her Certified Financial Planner (CFP) designation and FINRA licenses series 7 and 63.

LAURA PARISI, CPA

Treasurer
City of Laguna Beach
Laguna Beach, CA

Laura Parisi is the Treasurer at the City of Laguna Beach. She was appointed in 1999, then elected during the past seven election cycles. Her responsibilities are the receipt, deposit, and investment of city funds, banking, assessment district administration (including bond administration), and Transient Occupancy Tax reviews. During the pandemic, Ms. Parisi served as the Interim Assistant Treasurer-Tax Collector and Interim Director of Investment for the County of Orange. Ms. Parisi is a member of the Advisory Committee for CDIAC's *Local Agency Investment Guidelines* and a member of the Revenue and Taxation Committee for League of California Cities. Prior to her roles in the public sector, Ms. Parisi worked for almost 20 years in the private sector. Her jobs included Chief Financial Officer, Vice President of Finance, Controller, and Certified Public Accountant (CPA). Ms. Parisi is a Certified California Municipal Treasurer (CCMT) and a Certified Fixed Income Practitioner (CFIP) with degrees in accounting, business administration, and a minor in economics from Illinois State University.

RICK PHILLIPS

Chief Investment Strategist
Meeder Public Funds
Las Vegas, NV

Rick Phillips is the Chief Investment Strategist at Meeder Public Funds. Prior to joining Meeder, Mr. Phillips was the President of FHN Financial Main Street Advisors from 2004 to 2023, the Chief Investment Officer at Clark County, Nevada from 1998 to 2004, and the Investment Officer for the City of Las Vegas from 1989 to 1998.

Mr. Phillips is the founder of the Government Investment Officers Association (GIOA), which has over 1,000 government investment officers as members. He has a Bachelor of Science in Finance from Brigham Young University and a Master of Business Administration from the University of Utah.

KEVIN SHIRAH

Director of Finance
City of Lake Forest
Lake Forest, CA

Kevin Shirah is the Director of Finance and City Treasurer for the City of Lake Forest, California. From his first day out of college to his role today, he's been learning, leading, and building in governmental accounting. He believes effective financial stewardship blends communication, collaboration, and strategy to align resources with community goals.

ALAYNÈ MARIE SAMPSON, CTP

Senior Portfolio Strategist
Chandler Asset Management, Inc.
San Diego, CA

Alaynè Marie Sampson, CTP, joined Chandler Asset Management in 2022 as a Senior Portfolio Strategist, bringing a dynamic combination of business acumen, market knowledge, and insatiable curiosity to the firm. During her 20+ years, Ms. Sampson has held roles in process improvement and systems analysis, marketing, operations, and multiple facets of finance, making her a go-to resource for clients and colleagues alike.

One of Ms. Sampson's favorite ways of supporting clients is helping them understand market conditions and the broader economy so they can put public funds to their best and highest use within communities.

As a member of Chandler's Credit Committee, she assesses the financial health and trajectories of companies that might benefit client portfolios and keeps a pulse on economic trends. Ms. Sampson is known for being an excellent presenter and is frequently invited to speak at industry events and educational sessions.

Ms. Sampson is a graduate of Cornell University with a B.A. in Women's Studies. She holds the FINRA Series 65 license and the Certified Treasury Professional (CTP) designation.

KRYSTLE PALMER

City Treasurer
City of Burbank
Burbank, CA

Krystle Ang Palmer was elected City Treasurer in November 2020, receiving the highest number of votes cast for a city candidate in Burbank's history. Previously, Ms. Palmer was appointed City Treasurer by the City Council in 2019.

As City Treasurer, Ms. Palmer's top priority is safekeeping public funds. She ensures that Burbank has adequate cash on a day-to-day basis to pay for city services. Under Ms. Palmer's watch, the City's $650 million investment portfolio has yielded returns that continue to outperform benchmarks.

Ms. Palmer led the integration of Environmental, Social, and Corporate Governance (ESG) principles in Burbank's investment policy, affirming the City's commitment to sustainability, health, and fair practices, while upholding that safety, liquidity, and yield remain the primary investment objectives.

Under Ms. Palmer's tenure, the City Treasurer's Office, in partnership with a local credit union, launched the first-ever Burbank universal children's savings program, which provides $50 for all new Burbank babies, promoting long-term savings, discipline, and financial literacy.

Previously, Ms. Palmer built her career in finance and strategy in the private sector. With over 20 years of experience, she has worked as an investment analyst for a fund of hedge funds, and as a consultant for a top management consulting firm in New York City. Additionally, she has served as a finance and corporate strategist for a technology startup in Los Angeles.

In addition to her role as President-elect of the California Municipal Treasurers Association (CMTA), Ms. Palmer is also an active member of the Government Investment Officers Association (GIOA), the Government Finance Officers Association (GFOA), and the California Society of Municipal Finance Officers (CSMFO).

Ms. Palmer holds an M.S. in Financial Engineering from Columbia University. She also received a B.S. in Management Engineering and a B.A. in Economics (honors) from Ateneo de Manila University. With her passion for food and restaurants, Ms. Palmer has also completed a Certificate in Food and Beverage Operations from New York University.

Ms. Palmer lives in Burbank with her husband, Sean, their twin boys, Elliot and Grant, and daughter, Madeline.

MONIQUE SPYKE

Managing Director
PFM Asset Management LLC
San Francisco, CA

Monique Spyke is the Managing Director at PFM Asset Management LLC. As senior leader, she is responsible for overseeing the growth and operations of the firm's California practice. With over 20 years of experience, she excels in developing innovative investment strategies and building strong client relationships. Her work focuses on supporting municipalities, non-profits, hospitals, and educational institutions, managing billions of dollars in assets under advisement with precision and care. Ms. Spyke's approachable leadership style and dedication to her clients have earned her recognition as a trusted advisor and mentor in the investment management field.

KYLE TANAKA

Program Administrator
California Asset Management Program (CAMP)
Los Angeles, CA

Kyle Tanaka joined PFM Asset Management in 2019 after working closely with local government trade associations and municipalities throughout California. As a Program Administrator for the California Asset Management Program (CAMP), Mr. Tanaka focuses on providing investment resources to cities, counties, special districts, and other local agencies to help them manage their liquidity needs.

Prior to joining the firm, Mr. Tanaka worked for the California Special District Association (CSDA) and the California State Association of Counties (CSAC) Finance Corporation. While working at the CSAC Finance Corporation, he managed the day-to-day client services of their local government investment pool.

VISHAL THACKER

Assistant Treasurer
County of Alameda
Oakland, CA

Vishal Thacker is the Assistant Treasurer and Chief Investment Officer of the County of Alameda where he manages approximately $10 billion of the County's funds. Prior to his service with the County, he held several positions on Wall Street including Vice President of Trading and Sales at Morgan Stanley and advised clients on bond underwriting, real estate investments, and portfolio management. Mr. Thacker has invested in developing his knowledge of finance and contributing to its community. He previously served as the President of the California Municipal Treasurers Association (CMTA), a mission-driven group that seeks to promote and enhance the fiduciary responsibility and integrity of individuals responsible for public funds. He is also the Treasurer of the Investment Managers of Public Agencies Council (IMPAC), a trade group focused on improving communication and expertise for public sector investment officers within California and holds the designation of a Certified Treasury Professional (CTP) with the Association for Financial Professionals, an international society setting the standards of excellence in finance.

HUBERT (HUBIE) WHITE

Chief Investment Officer
City and County of San Francisco
San Francisco, CA

As Chief Investment Officer of the City and County of San Francisco, Hubert (Hubie) White is responsible for management of the City's $16+ billion short duration fixed income portfolio. His responsibilities include setting portfolio strategy, reviewing and analyzing macroeconomic data, performing security and cash flow analysis, and the day-to-day trading of the portfolio. He is also responsible for management and oversight of the investment team.

Before joining the city in 2014, Mr. White spent over 25 years at various asset management firms specializing in the management of short duration fixed income portfolios. These included numerous money market mutual funds, enhanced cash portfolios, securities lending cash reinvestment portfolios, and separately managed short duration fixed income accounts for corporations, municipalities, and individuals.

Mr. White has earned the right to use the Chartered Financial Analyst (CFA) designation from the CFA Institute. He also earned the Certified Treasury Professional (CTP) designation from the Association of Financial Professionals. Mr. White is a member of the CFA Institute, the CFA Society of San Francisco, and the Association of Treasury Professionals. He is the past President for the California Municipal Treasurers Association (CMTA), the past President of the Investment Managers of Public Agencies Council (IMPAC), and the current President of the Government Investment Officers Association (GIOA). He is also a member of the Government Finance Officers Association's (GFOA) Treasury & Investment Management Committee.

Mr. White received a Bachelor of Science in Business Administration from the Robins School of Business at the University of Richmond.

JEFFREY (JEFF) WURM

Director, Investments Division
California State Treasurer's Office
Sacramento, CA

Jeff Wurm, a 24-year employee of the State Treasurer's Office, was appointed as the Director of the Investment Division for the State Treasurer's Office in 2022. Prior to this appointment, Mr. Wurm served as the Assistant Director for the Investment Division for five years. During his 16-year tenure with the division, Mr. Wurm has been an authorized trader, the Time Deposit Program Manager, and the Credit Manager for the Pooled Money Investment Account (PMIA). Mr. Wurm began his career at the State Treasurer's Office in the Securities Management Division, where he cleared and settled the trades for the PMIA. He also worked in the Cash Management Division managing vault services and assisted with the long-range cash forecast. Before joining the State Treasurer's Office, Mr. Wurm spent two years at E*TRADE Securities and two years at Franklin Templeton Investments. He earned his Bachelor of Science degree in Business Administration (Business Management) from California State University, Fresno.
