SPEAKER BIOGRAPHIES

Advanced Public Funds Investing January 22 – 23, 2025 | Costa Mesa, CA

PARTH BHATT

Chief Deputy Treasurer, County of San Bernardino
Professor of Finance, University of California, San Diego
San Bernardino, CA

Parth Bhatt joined the San Bernardino County Treasurer Division in 2016 and was appointed Chief Deputy Treasurer in 2023. Prior to his San Bernardino County service, Mr. Bhatt served as Portfolio Manager for Orange County and worked in the private sector as a Portfolio Management Associate and an Assistant Portfolio Manager. He holds a Bachelor of Arts and a Master of Arts in economics from California State University, Fullerton, and a diploma in computer engineering from Mumbai University. Mr. Bhatt is an adjunct Professor of Finance at UC San Diego's Rady School of Management. He teaches MGTF – 495 on fixed income investing for the Master of Finance program. He is an advisory board member of California State University, Fullerton's Titan Capital Management program.

IAN CAPULE, CFA

Assistant Investment Officer
County of San Bernardino
San Bernardino, CA

Ian Capule started his career at San Bernardino County in July of 2013 as an Investment Analyst intern. He was promoted to the full time Investment Analyst position in 2014 where he gained extensive experience on financial analysis and analyzing investment grade credits in various sectors such as banking, technology, oil, pharmaceuticals, and multinational conglomerates. In 2023, he was promoted to the Assistant Investment Officer position where he currently manages the liquidity needs of the County with short -term fixed income securities. Mr. Capule holds the Chartered Financial Analyst (CFA) designation and has a Bachelor of Science in business administration-finance from California State University, San Bernardino.

ROBIN DIXON

Investment Officer
County of San Bernardino
San Bernardino, CA

Robin Dixon started her career at San Bernardino County's Treasurer division in June 2003 as an Investment Analyst Trainee. She was promoted in 2004 to a full time Investment Analyst position, where she expanded the County's approved issuer list and gained knowledge on financial analysis and analyzing companies across different industry sectors. She navigated through the 2008 financial crisis and European sovereign debt crisis and protected county assets during the volatile credit cycle. In 2016, Ms. Dixon was promoted to the Assistant Investment

Officer position where her responsibilities included managing the cash and liquidity needs of the County. In 2023, she was promoted to the Investment Officer role.

Ms. Dixon holds a Bachelor of Science in business administration-finance from California State University, San Bernardino.

BENJAMIN (BEN) FINKELSTEIN, CFA

Managing Director
Robert W. Baird & Co.
Houston, TX

Ben Finkelstein is a managing director at Robert W. Baird & Co. 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."

WILLIAM (WILL) GOLDTHWAIT

Client Portfolio Manager
State Street Global Advisors
Boston, MA

Will Goldthwait is a Portfolio Strategist at State Street Global Advisors where he is a member of both the Global Cash and Global Fixed Income Investment Management Teams. He is responsible for communicating cash and fixed income investment strategies and performance to clients, consultants, and prospects. Mr. Goldthwait covers multiple sectors and vehicles, including both active and indexed fixed income investments.

Before joining State Street Global Advisors in 2014, Mr. Goldthwait gained experience on both the advisory and brokerage sides of the business. He most recently worked with Royal Bank of Scotland's Institutional Fixed Income Sales team and Merrill Lynch's Institutional Money Market Sales team. Prior to Merrill Lynch, he served as a Money Market Portfolio Manager and Fixed Income Trader for Columbia Management and Fleet Investment Advisors.

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.

CARLOS OBLITES

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

Carlos Oblites is a Senior Portfolio and Investment Pool Strategist at Chandler Asset Management. He is responsible for building and maintaining client relationships with public agencies along with participating actively in the portfolio management process. Mr. Oblites has nearly 30 years of investment and financial experience, focused largely on managing fixed income and pension strategies for local governments and other institutional investors.

Prior to joining Chandler, Mr. Oblites served as the Administrative Services Manager at Central Marin Sanitation Agency and was responsible for all aspects of the Agency's financial, human resources, administrative, and information systems activities. He also has significant expertise in serving the investment needs of California public agencies through his roles as Director at PFM Asset Management and as a Principal at Wells Capital Management.

Mr. Oblites holds a Bachelor of Arts degree in history from the University of California, Santa Barbara, and earned a master's degree in business administration from San Francisco State University.

MATTHEW (MATT) PAULIN

Director of Finance and Treasurer
City of Elk Grove
Elk Grove, CA

Matt Paulin possesses more than 28 years of public sector work experience. He currently serves as the Finance Director and Treasurer for the City of Elk Grove. Before then, he served in various leadership positions with San Joaquin County, the City of Stockton, the California Department of Finance, and the California Department of Motor Vehicles. Mr. Paulin is also a member of the CalTRUST Board of Trustees, is an Army veteran, and holds a bachelor's degree from the University of the Pacific and a master's degree from California State University, Stanislaus.

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.

MARILOU TAN
Assistant Treasurer-Tax Collector
County of Ventura
Ventura, CA

Marilou Tan joined the Treasurer-Tax Collector in November 2015. She served as the Administration Manager and Treasury Manager for the agency before becoming the Assistant Treasurer-Tax Collector in 2022. Prior to her career in public service, Marilou worked in the private sector, where she has 20 years of combined experience in SEC and financial reporting, SOX compliance, auditing, finance, and accounting. She has been a Certified Public Accountant since 2000. Marilou has earned the Certified Public Funds Investment Manager (CPFIM), the Advanced Certified Public Funds Investment Manager (ACPFIM), and the Certified Public Finance Administrator certifications from the Association of Public Treasurers of the United States & Canada (APT US&C). She has also earned the California Certified Municipal Treasurer (CCMT) certification from the California Municipal Treasurers Association (CMTA). She received a Bachelor of Science in Accounting and Finance, and a Master of Public Administration from California State University, Northridge.

PETER TCHIR
Head of Macro Strategy
Academy Strategies
New York, NY

Peter Tchir, Head of Macro Strategy at Academy Securities, has over 30 years of experience on Wall Street. He began his career as a trader and structurer in the early credit derivatives market and went on to lead credit beta trading at UBS and RBS before and during the Global Financial Crisis, trading over $1 trillion in fixed income products. For the past 13 years, he has advised large asset managers, hedge funds, and more recently, Fortune 500 companies on the evolving macroeconomic landscape and its implications for decision-making.

At Academy Securities, a unique aspect of their approach is their Geopolitical Intelligence Group, which integrates geopolitical insights into their macro perspectives to provide enhanced guidance on global investments. Mr. Tchir is a regular contributor to print media and frequently appears on financial media channels.

VISHAL THACKER
Chief Investment Officer & 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 several transactions including 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 Treasurer's 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.

KEVIN WEBB, CFA
Managing Director
Robert W. Baird & Co.
Las Vegas, NV

Kevin Webb joined Robert W. Baird & Co. in 2021 and is constantly seeking sleep-adjusted returns in a sleepless world. He holds the Chartered Financial Analyst (CFA) designation and is a member of both the CFA Institute and Global Association of Risk Professionals.

HUBERT (HUBIE) WHITE, CFA, CTP
Chief Investment Officer
City and County of San Francisco
San Francisco, CA

As Chief Investment Officer of the City & County of San Francisco, Hubie White is responsible for the management of the City's $16+ billion short duration fixed income portfolio. His responsibilities include setting of 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.