



## SPEAKER BIOGRAPHIES

*Municipal Market Disclosure*

April 8–9, 2025 | Costa Mesa, CA



### **MARGARET (MARGIE) BACKSTROM**

*Managing Director and Co-Head of Public Sector Group*  
Morgan Stanley  
San Francisco, CA

Margie Backstrom is a Managing Director and Co-Head of the Public Sector Group for Morgan Stanley's Public Finance Department based in San Francisco. Ms. Backstrom has over 26 years of experience as a public finance investment banker. She co-leads a group that is responsible for providing investment banking services to public sector clients including states, counties, cities, water agencies, school districts, transit districts, transportation agencies, and airports nationally from eight regional offices. Ms. Backstrom joined Morgan Stanley as an Analyst in Public Finance in New York. After completing a rotation in Corporate Finance, she left Morgan Stanley to attend business school and returned to Morgan Stanley's Public Finance Department in San Francisco in 2001. She was named Head of the Western Region Infrastructure Group in 2016.

Ms. Backstrom's clients include some of the largest issuers in the country, including the states of California and Oregon, the cities of Los Angeles, San Diego, Denver, Phoenix and Sacramento, the counties of Sacramento, San Bernardino and Los Angeles, and a number of water districts, sewer districts, transportation districts, special districts, and airports across eight western states. She is an expert in a wide variety of bond structures and credits, having senior managed more than \$42 billion in financings for public sector clients. Previously, Ms. Backstrom worked for a small online financial services company, most recently as Vice President of Business Development and Marketing.

Ms. Backstrom earned a master's degree in business administration from the Stanford Graduate School of Business and an undergraduate degree in economics from Stanford University.



### **MARC BAUER**

*Partner*  
Orrick, Herrington & Sutcliff LLP  
Los Angeles, CA

In complex financing matters, Marc Bauer excels by working with his clients to formulate the best possible financing plan based on state-of-the-art practices.

Mr. Bauer partners with government bond issuers, non-profit organizations, and universities, and has experience assisting leaders in affordable housing, public power agencies, private universities, museums, and charter schools with their financing goals. Mr. Bauer provides reliable, sought-after advice to issuer and underwriter clients in transactions involving both long- and short-term, fixed and variable rate obligations, commercial paper, credit and liquidity enhancement, and revenue bonds.

Prior to becoming an attorney, Mr. Bauer was an economic consultant at Deloitte & Touche LLP and Arthur Andersen LLP. Mr. Bauer obtained his J.D./M.B.A. at the University of Southern California.



**DANIEL (DAN) DEATON**

*Partner*  
Nixon Peabody LLP  
Los Angeles, CA

Daniel Deaton is a partner in the Public Finance group of Nixon Peabody LLP. He represents governmental agencies, nonprofit corporations, underwriters, and others as bond counsel, disclosure counsel, and underwriter's counsel in a wide variety of tax-exempt and taxable public finance transactions. Mr. Deaton has considerable experience in general fund, water, transportation, university, and cultural institution financings. He also has extensive experience in a wide variety of transaction structures, including traditional fixed-rate bonds, variable-rate demand bonds, commercial paper, and index tender rate bonds.

Mr. Deaton earned a Juris Doctor from Southern Methodist University and received a Bachelor of Arts from the University of California, Irvine.



**RENEE DOUGHERTY, CFA**

*Director, Municipal Research*  
Charles Schwab Asset Management  
San Francisco, CA

Renee Dougherty is a Director and Head of Municipal Money Fund Research for Schwab Asset Management, overseeing the team responsible for analyzing and monitoring municipal securities being considered for or held by the Schwab Municipal Money Funds. In addition, Ms. Dougherty is a lead analyst for the water and sewer, public power, and transportation sectors.

Prior to joining Schwab in 2005, she was a Senior Municipal Analyst and Vice President at Bank of America Capital Management and its predecessors for seven years. In addition, she was a Municipal Analyst at Greenwich Partners LLC for four years.

Ms. Dougherty earned a master's in public policy from the Kennedy School of Government at Harvard University and a Bachelor of Arts from the University of California, San Diego. She has served on the Board of Directors of the National Federation of Municipal Analysts and is a past Chairwoman of the California Society of Municipal Analysts. She is also a Chartered Financial Analyst (CFA) charter holder.



### **BRIAN GARZIONE**

*Partner*

Hawkins Delafield & Wood LLP  
Washington, D.C.

Brian Garzione, a partner in the firm's Washington, D.C. office, serves primarily as disclosure counsel and underwriters' counsel on a wide variety of tax-exempt and taxable financings representing issuers and underwriters with the issuance of all types of bonds, notes, and other debt instruments.

Representing clients on both public offerings and private placements, Mr. Garzione advises a full range of participants in the municipal finance market, including state and local governments, underwriting firms, and conduit issuers. His experience includes drafting offering documents and negotiating debt instruments and credit agreements for all types of fixed-rate, variable-rate, and multi-modal financings. Mr. Garzione is also involved with many of the firm's transportation-related engagements.

Additionally, Mr. Garzione advises clients on the federal securities laws, assisting clients with the development and implementation of disclosure policies and conducting the related securities law training sessions.

As the chief securities law partner for the firm, Mr. Garzione is principally responsible for authoring client advisories, or "Hawkins Regulatory Updates," describing and analyzing important SEC enforcement actions and other securities law regulatory and rulemaking matters.

Mr. Garzione is also a frequent speaker, panelist, and moderator of securities law presentations at industry conferences. In that connection, Mr. Garzione has held prominent roles with the National Association of Bond Lawyers (NABL), including work with the Securities Law and Disclosure Committee (SLDC) where he acted as chair and vice-chair of the committee for over four years. During such time, Mr. Garzione had a crucial role in steering the committee agenda and took an active role on several high-profile projects and meetings. Mr. Garzione led several noteworthy projects as part of the leadership of the SLDC, including NABL's SEC Comment Letter on Climate Change Disclosure, the supplement to NABL's Crafting Disclosure Policies, and NABL's "Analysis of SIFMA Model Memorandum to Underwriter's Counsel," among others. Mr. Garzione was also a key participant in NABL's working group that released the paper titled "SEC Rule 15c2-12 Amendments NABL Member Questions and Practical Considerations."



### **JAY GOLDSTONE**

*Financial Services Advisor*

Self-employed  
San Diego, CA

Jay Goldstone served as a Special Advisor to the Mayor of the City of San Diego, overseeing the redevelopment of six contiguous blocks in the heart of downtown San Diego, including the City's Civic Center until February 2025.



Prior to that, he was the Interim Chief Operating Officer for the City of San Diego from December 2020 to October 2022 where he was responsible for day-to-day operations of the City, a position he previously held from 2007 to 2013.

Prior to rejoining the City, he was a Managing Director in the Public Finance Group for Mitsubishi UFJ Financial Group (MUFG) from October 2013 until January 2020. Mr. Goldstone has had a successful 40-year career in municipal government in financial and executive capacities. He has held such positions as Chief Operating Officer and Chief Financial Officer for the City of San Diego, CA; Director of Finance for the City of Pasadena, CA; Manager of Finance for Maricopa County, AZ; Interim City Manager and Director of Finance for the City of Richmond, CA; and Deputy Director of Finance for the City of Santa Clara, CA.

Mr. Goldstone has served on the Board of Directors of the Municipal Securities Rulemaking Board and was Chair of the Board from October 1, 2012, to September 30, 2013. He served as a Commissioner on the California Debt and Investment Advisory Commission for seven years, as Chair of the League of California Cities Revenue and Taxation Committee for one year, is currently Co-Chair of the California State Treasurer's Task Force on Bond Accountability, and a technical advisor for the GFOA Debt Policy Committee.

Mr. Goldstone received a bachelor's degree from the University of Minnesota, a master's degree in public administration from Arizona State University, and a master's degree in business administration from Santa Clara University.



### PAULINA HARO

*Senior Project Advisor*  
Governmental Accounting Standards Board  
Norwalk, CT

Paulina Haro is a senior project advisor with the Governmental Accounting Standards Board in Norwalk, Connecticut. Her current project assignments include leading the development of the Revenue and Expense Recognition project and the development of a digital taxonomy for Electronic Financial Reporting. She also oversees the pre-agenda

research for note disclosures related to the RER project.

She contributed to the development of Statements on Fair Value Measurement (72), Blending Requirements (80), Irrevocable Split Interest Agreements (81), and the 2020-1 Technical Bulletin, CARES Act.

Before joining the GASB staff in 2014, Ms. Haro worked as a Financial Analyst, Cash Manager, and subsequently as Treasurer for the City of Fayetteville, North Carolina, as well as CIP Fiscal Manager for the City of Raleigh.

Paulina received a bachelor's degree in business administration—accounting *summa cum laude* honors from Campbell University. She also holds a master's degree in business administration from the University of North Carolina, Chapel Hill, and is licensed as a Certified Public Accountant in the State of North Carolina.



**DONALD (DON) HESTER, CISSP, CISA, CGRC, CRISC**

*Cybersecurity Advisor*

Cybersecurity and Infrastructure Security Agency  
San Francisco, CA

Donald Hester is a cybersecurity advocate who has worked to make the world cybersafe in his roles as a cybersecurity auditor, educator, and cybersecurity manager for the past 25 years. Mr. Hester joined the Department of Homeland Security's Cybersecurity and Infrastructure Security Agency (CISA) in 2023. He currently serves as a Cybersecurity

Advisor in San Francisco and covers Northern California. Prior to CISA, he was the cybersecurity manager at City of Livermore, managing governance, risk, and compliance to ensure Livermore was cyber safe.

Prior to Livermore, Mr. Hester gained more than 20 years of experience as an information technology (IT) auditor and cybersecurity director at Maze & Associates. He has taught IT and cybersecurity courses for a number of universities and colleges.

Mr. Hester has a master's degree from Biola University and a bachelor's degree in security management from American Military University. His professional certifications include CISSP, CISA, CGRC, CRISC, Security+, CTT+, and MOFF. Donald is a Marine Veteran and started his career as a field radio operator.



**JACQUELYNNE (JACQUI) JENNINGS**

*Partner*

ArentFox Schiff LLP  
San Francisco, CA

Jacqui Jennings is a partner at ArentFox Schiff Hardin LLP. She concentrates her practice in finance and corporate transactions with an emphasis on public finance. Ms. Jennings has more than 25 years of experience serving as bond counsel, disclosure counsel, underwriter's counsel, and issuer's counsel in connection with a broad range of

municipal financings, including fixed- and variable-rate, tax-exempt and taxable, refunding and restructuring, insured, letter of credit, and liquidity supported bonds and re-offering and re-marketing, senior/subordinate/capital appreciation, direct purchase, and bank-qualified transactions.

Ms. Jennings is a member of the National Association of Bond Lawyers and is a frequent speaker on municipal disclosure issues for CDIAC and other organizations. She is a former chair of the CDIAC Debt Technical Advisory Committee, a former member of the Board of Directors and Executive Committee of Merritt Community Capital Corporation, a non-profit tax syndicator, and a former member of the board of directors and executive committee of Central City Hospitality House. Ms. Jennings currently serves on the board of trustees for De Marillac Academy.

Ms. Jennings is a graduate of University of California, Berkeley, and received her law degree from the University of California, Los Angeles School of Law.





**BRIAN MCCARTAN**

*Senior Fellow*  
Ceres, Inc.  
Bellevue, WA

Brian McCartan is a Senior Fellow, bringing with him more than thirty years of experience in public finance at the international, federal, and regional level. He served as CFO at both the University of Washington and Sound Transit. At Sound Transit, he initiated the agency's \$2.4 billion green bond program. Mr. McCartan also served as Debt Manager for the City of Seattle, managing debt issuance and capital project financing for the City and its power and water and wastewater utilities. Additionally, Mr. McCartan worked as an International Economist at the U.S. Treasury.



**DIANE QUAN**

*Partner*  
Hawkins Delafield & Wood LLP  
Los Angeles, CA

Diane Quan has over two decades of securities and governance experience, and has served as bond counsel, disclosure counsel and underwriter's counsel on a wide array of debt obligations undertaken by issuers large and small, with an emphasis on water, housing, education, general fund and transportation financings.

Ms. Quan participated in the representation of the State of California's Water Resource Control Board in the development of its California Clean Water and Drinking Water State Revolving Programs to provide financial assistance to local governments for clean water and safe drinking water projects and continues to serve as bond counsel for the program.

She also advises general obligation bond issuers, including cities, water districts, school districts and community college districts, and has served as underwriters' counsel on numerous general obligation bond issuances, including issuances by the State of California and issuances that were additionally secured by other available moneys of the issuer (i.e., double-barreled bonds).

Ms. Quan's practice includes a variety of housing-related financings, including serving as bond counsel to a county development authority in connection with its issuance of multifamily housing mortgage revenue bonds and the preparation of various interlocal agreements involving projects with multiple jurisdictional interests, and serving as bond counsel to a housing authority that issues obligations on its own behalf to finance government-owned multifamily housing.

Ms. Quan has also participated in numerous water financings, wastewater financings, transportation financings, revenue bond financings, lease revenue bond financings, certificate of participation financings, private placements, assessment district financings, tobacco settlement securitization financings, housing financings, state revolving fund financings, pooled financings, cash flow financings, commercial paper financings, tax allocation bond financings and conduit financings for 501(c)(3) borrowers.



Ms. Quan is a member of the California State Bar, the American Bar Association and the National Association of Bond Lawyers ("NABL"), and an author and participant on multiple NABL publications, including the Report entitled "Disclosing Risk Factors in Municipal Securities Offerings" (July 11, 2023). Ms. Quan served as bond counsel on *The Bond Buyer's* 2024 Far West Deal of the Year, which was the largest issuance of that year and involved a then-innovative refunding of Build America Bonds.

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### NIKOLAI SKLAROFF

*Capital Finance Director*  
San Francisco Public Utilities Commission  
San Francisco, CA

Nikolai J. Sklaroff joined the San Francisco Public Utilities Commission (SFPUC) as its Capital Finance Director in May 2022. As Capital Finance Director, he is responsible for developing, implementing and administering the SFPUC Capital Financing activities across the agency. He leads a team of professionals supporting the agency's capital project

funding activities including financing transactions, banking agreements, commercial paper program activities, credit rating activities and debt administration, among others. The role serves in a key leadership function at the SFPUC. The Capital Finance Director manages the day-to-day operations of the SFPUC's capital finance portfolio which includes nearly \$7 billion of outstanding bonds, nearly \$1.9 billion of state and federal loans and the daily operations of the SFPUC's three Commercial Paper Programs totaling \$1.5 billion across three enterprises, Water, Wastewater and Power. In December of 2022, California State Treasurer Fiona Ma announced her appointment of Mr. Sklaroff to the California Debt and Investment Advisory Commission.

Mr. Sklaroff has spent more than three decades in the public finance industry and most recently served as the Deputy Director of Finance responsible for the Debt & Treasury Management division in the City of San José. In that role, he oversaw teams managing the City's \$4.6 billion debt portfolio across all enterprises, managing the City's \$2.4 billion investment portfolio and managing the City's banking operations. Mr. Sklaroff has also spent 22 years as a senior public finance investment banker in San Francisco with Citigroup Global Markets, J. P. Morgan Securities as national Head of Cultural Institutions investment banking, and Wells Fargo Securities. Prior to becoming an investment banker in 1997, Mr. Sklaroff was a senior Moody's Investors Service rating agency analyst and member of Moody's rating committee. Mr. Sklaroff began his career as a financial advisor with Public Financial Management, Inc., in his hometown of Philadelphia, where he received his degrees from the Wharton School and the College of Arts and Sciences of the University of Pennsylvania, prior to moving to England (to live in a castle) to pursue his graduate degree. He pursued further graduate studies at Columbia University's School of International and Public Affairs prior to moving to San Francisco.

A frequent speaker at industry conferences and author on public finance topics, Mr. Sklaroff has also served on multiple boards of directors and advisory committees. Mr. Sklaroff is currently serving on the Government Finance Officers Association (GFOA) Debt Committee. As a former California Debt and Investment Advisory Commission (CDIAC) Technical Advisory Committee (TAC) member, Mr. Sklaroff continues to enjoy assisting CDIAC with policy publications and seminars.

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**SAMUEL (SAM) L. SMALLS**

*Treasury and Debt Manager*  
Metropolitan Water District of Southern California  
Los Angeles, CA

Sam Smalls joined the Metropolitan Water District of Southern California in March 2021 in the position of Manager of Treasury and Debt Management in the office of the CFO. In this role, Mr. Smalls leads a team responsible for cash management, investment portfolio management, treasury operations, debt issuance and management, property tax program management, and administration of the District's Procurement Card (P-Card) program.

Mr. Smalls has had a career in municipal finance spanning over 30 years as a municipal advisor, state agency executive director, and wholesale/investment banker. Before Metropolitan, Mr. Smalls served as head of California Public Finance at several large and boutique investment banking firms. Mr. Smalls was a generalist banker, assisting with municipal infrastructure bond financing of over \$20 billion as lead or co-senior manager and over \$160 billion as co-manager. Mr. Smalls previously worked in the public sector as Executive Director of the California Pollution Control Financing Authority, an appointed position by the California State Treasurer. Mr. Smalls also served as Assistant Vice President/Deputy Director of Policy, Research, & Planning for the Federal Home Loan Bank of San Francisco.

Mr. Smalls began his professional career as a municipal advisor with Public Financial Management, where he served a broad array of municipal clients, including cities, counties, special districts, transportation agencies, and toll road agencies throughout California. Mr. Smalls is an alumnus of CORO's Leadership Southern California leadership development program and has a Bachelor of Arts in social studies *cum laude* from Harvard College.



**DAVID SONG**

*Associate*  
Nixon Peabody LLP  
Los Angeles, CA

David Song serves as bond, disclosure, issuer, borrower, and underwriter's counsel on taxable and tax-exempt financing transactions for numerous governmental entities and large nonprofit organizations such as universities and hospital systems.

Mr. Song focuses on representing states, counties, cities, school districts, large nonprofit organizations, underwriters, and borrowers on a variety of infrastructure and capital improvement finance transactions, including general obligation bonds, revenue bonds, letters of credit, certificates of participation, and tax and revenue anticipation notes. This includes due diligence reviews for compliance with state, local, and federal laws, drafting offering and underlying legal documents, and researching complex legal issues to assist clients with successfully financing their projects.

Prior to joining the firm, Mr. Song's experience included executing tax and complex regulatory compliance projects for public, private, and government clients, as well as preparing and reviewing





corporate, pass-through, and individual amended tax returns and representing clients in examinations before the IRS and California Franchise Tax Board.

Mr. Song has been named to the Los Angeles Business Journal's 2023 Leaders of Influence: Minority Attorneys, recognized as a finalist in the Los Angeles Business Journal's Leaders in Law—Rising Star awards 2021, and is the firm's liaison with the National Veterans Legal Services Program as a Marine Corps combat veteran himself.



**KRYSTAL TENA**

*Associate Director*  
S&P Global Ratings  
Riverside, CA

Krystal Tena is an Associate Director with the Local Governments West Region group in S&P Global Ratings Americas Public Finance department. She has served as primary credit analyst for local government credits in East and West region markets, and is currently a portfolio lead for California cities, counties, and school districts. She also serves as

Analytical Lead for the Public Finance Cyber Risk Research Team and is on the Ratings'-wide Artificial Intelligence Research Team. She is interested in credit conditions and emerging risks in the public finance sector.

Krystal earned an MA in International Affairs concentrating in urban policy and advanced economic policy analysis from Columbia University's School of International and Public Affairs (SIPA). She also holds BAs in Economics, Sociology, and Latin American/Latino Studies from the University of California, Santa Cruz.



**SEAN TIERNEY**

*Partner*  
Hawkins Delafield & Wood LLP  
San Francisco, CA

Sean Tierney has devoted his legal career to public finance, serving as bond counsel, disclosure counsel, underwriters' counsel and bank counsel. Mr. Tierney opened the San Francisco office of Hawkins in 2000. His practice areas include government finance, nonprofit corporation finance and representation of banks, including direct placement loans. His

government clients include the City and County of San Francisco, the cities of Oakland and San Jose, and the counties of Alameda, Santa Clara, and Solano. Mr. Tierney has recently worked on nonprofit corporation financings for the Academy of Motion Picture Arts and Sciences, California Academy of Sciences, Claremont McKenna College, the Los Angeles County Museum of Art, the Salk Institute, Scripps Research Institute and Stanford University. Mr. Tierney frequently represents banks in connection with a variety of credit facilities, including direct placement loans.

Mr. Tierney has extensive experience serving as bond counsel and disclosure counsel to public agencies in general obligation and lease financings, water, sewer and other enterprise financings, transportation



and redevelopment, and multifamily housing bond financings. He has worked with numerous California counties and cities, including the counties of Alameda, Solano, San Francisco, Santa Clara and Tehama and the cities of Oakland, Roseville, Salinas, San Mateo, San Jose, Tulare, and Watsonville. Mr. Tierney has also worked with a variety of special districts including the Central Marin Sanitation Agency, Oro Loma Sanitary District, Santa Clara Valley Water District and Sausalito-Marín City Sanitary District.

Mr. Tierney is active in the area of nonprofit corporation finance, including higher education, K-12 private schools, cultural institutions, and research and scientific institutions. He frequently serves as bond counsel, disclosure counsel, lender's counsel, and underwriters' counsel for financings in this area. Mr. Tierney has worked with a variety of nonprofit institutions, including the Academy of Motion Picture Arts and Sciences, California Academy of Sciences, Claremont McKenna College, the Los Angeles County Museum of Art, the Los Angeles Natural History Museum, Loyola Marymount University, the Salk Institute, Scripps College, Stanford University, University of San Francisco, and numerous other educational and cultural institutions. Mr. Tierney has worked with a wide variety of primary and secondary private schools, including the Branson School, Francis Parker School, La Jolla Country Day School, Marin Academy, Menlo School, Polytechnic School, and University High School.

Mr. Tierney is a frequent speaker at bond finance conferences, including conferences sponsored by the American Association of Port Authorities, *The Bond Buyer*, the California Association of Museums, the California Society of Municipal Analysts, the Association for Governmental Leasing and Finance, and the California Debt and Investment Advisory Commission. Mr. Tierney is the past President of the Bay Area Municipal Forum, served on the Board of Trustees, and the Finance and Audit Committees, of the San Francisco Asian Art Museum, and served as a member of the Citizens Advisory Committee of the Marin Municipal Water District.



### AMANDA TRUSSELL

*Principal Administrative Analyst*  
County of San Bernardino  
San Bernardino, CA

Amanda Trussell is currently a Principal Administrative Analyst in the County Administrative Office of Finance and Administration at the County of San Bernardino. Ms. Trussell began her career at the County in 2002 and has worked in various fiscal roles across various county departments.

Since 2017, she has overseen the County's debt compliance program, county-wide revenues, and realignment revenues. She holds a Master of Business Administration with a concentration in finance and strategy from the Peter F. Drucker School of Management, as well as a Bachelor of Arts in business economics from University of California, Riverside.



**ANNA VAN DEGNA**

*Public Finance Director*  
City & County of San Francisco  
San Francisco, CA

Anna Van Degna serves as the Public Finance Director for the City & County of San Francisco. In her role, she oversees the issuance of all new debt secured by property taxes and general fund sources, initiates the City's debt policies and procedures and provides technical expertise for the preparation and monitoring of the City's Ten-Year Capital Plan.

Previously, Ms. Van Degna was a Managing Director at Stifel where she structured over 250 municipal bond transactions for California cities, counties and special districts. Prior to joining Stifel in 2002, she worked in the investment banking division of Morgan Stanley. Ms. Van Degna has a Bachelor of Science in hospitality administration from Cornell University.



**DR. JAN WHITTINGTON**

*Associate Professor, Dept. of Urban Design and Planning*  
University of Washington, Seattle  
Seattle, WA

Dr. Jan Whittington is an Associate Professor of the Department of Urban Design and Planning, at [the University of Washington, Seattle](#), where she is the founding Director of the [Urban Infrastructure Lab](#), Associate Faculty at [the Tech Policy Lab](#), a Senior Non-Resident Fellow of [the Brookings Institution](#), and the founder and CEO of the spin off [Climate Solutions](#)

[International, Inc.](#).

Prior to her academic appointment, she was a strategic planner and scientist for the international infrastructure developer, Bechtel Corporation. She is a global expert in infrastructure economics, climate-smart capital planning, and city climate finance. For the World Bank's City Creditworthiness Initiative, Dr. Whittington has worked with municipalities in 30 countries at the intersection of climate change and capital planning. Her publications address climate change through capital investment planning, the evaluation of smart city infrastructure systems, and the efficiency of public-private contractual arrangements for infrastructure.

Dr. Whittington's PhD (2008) is in City and Regional Planning from the University of California, Berkeley, where she was advised by economic Nobel laureate Oliver Williamson. She holds bachelor's degrees in biology and environmental studies from the University of California, Santa Cruz (1987) and a master's degree from California Polytechnic State University, San Luis Obispo (1993).



**DANIEL (DAN) L. WILES**

*Board Member*

Municipal Securities Rulemaking Board  
Rancho Santa Margarita, CA

Daniel L. Wiles has over 42 years of public finance experience, including serving as Assistant Treasurer and Tax Collector of Los Angeles County, responsible for public finance, deferred compensation plan investments and cash management investments, positions as a bond and underwriters counsel with firms in the Midwest US, and municipal advisors in

Minnesota and California. He is currently a public member of the Municipal Securities Rulemaking Board and previously served on MSRB's Compliance Advisory Group and on the Government Finance Officers Association Standing Committee on Treasury and Investment Management. He holds a Bachelor of Science, *magna cum laude*, in economics and a JD, *magna cum laude*, from the University of Minnesota.



**MATTHEW (MATT) WINGERT**

*Budget Manager*

Los Angeles County Metropolitan Transportation  
Authority  
Los Angeles, CA

Matthew Wingert is currently a Budget Manager in the Treasury Department at Metro. He began his career at Metro as an Intern in 2013. He oversees debt compliance, the green bonds program, and proceeds management. He holds a Master of Business Administration from the

Peter F. Drucker and Masatoshi Ito School of Management as well as a Bachelor of Science with an emphasis in Finance from California State Polytechnic University, Pomona.