

File No. 131108

Committee Item No. 6

Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Rules Committee

Date November 21, 2013

Board of Supervisors Meeting

Date _____

Cmte Board

- | | | |
|-------------------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Motion |
| <input type="checkbox"/> | <input type="checkbox"/> | Resolution |
| <input type="checkbox"/> | <input type="checkbox"/> | Ordinance |
| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Digest |
| <input type="checkbox"/> | <input type="checkbox"/> | Budget and Legislative Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Youth Commission Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Introduction Form |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/> | <input type="checkbox"/> | MOU |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Information Form |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Subcontract Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Contract/Agreement |
| <input type="checkbox"/> | <input type="checkbox"/> | Form 126 – Ethics Commission |
| <input type="checkbox"/> | <input type="checkbox"/> | Award Letter |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Application |
| <input type="checkbox"/> | <input type="checkbox"/> | Public Correspondence |

OTHER

(Use back side if additional space is needed)

- | | | |
|-------------------------------------|--------------------------|-----------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>Form 700</u> |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | _____ |

Completed by: Linda Wong Date November 18, 2013

Completed by: _____ Date _____



Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
(415) 554-5184 FAX (415) 554-7714

Application for Boards, Commissions, Committees, & Task Forces

Name of Board, Commission, Committee, or Task Force: TREASURY OVERSIGHT CTE

Seat # or Category (If applicable): 4 District: _____

Name: CHARLES M. PERL

Home Address: GRAND VIEW AVE, SF CA Zip: 94114

Home Phone: 415 — Occupation: DEPUTY CFO, SFPUC

Work Phone: 415 487 5262 Employer: CCSF - SFPUC

Business Address: 525 GOLDEN GATE AVE, SF CA Zip: 94102

Business E-Mail: CPERL@SPWATER.ORG Home E-Mail: _____ @GMAIL.COM

Pursuant to Charter Section 4.101 (a)2, Boards and Commissions established by the Charter must consist of electors (registered voters) of the City and County of San Francisco. For certain other bodies, the Board of Supervisors can waive the residency requirement.

Check All That Apply:

Registered voter in San Francisco: Yes ☒ No ☐ If No, where registered: _____

Resident of San Francisco ☒ Yes ☐ No If No, place of residence: _____

Pursuant to Charter section 4.101 (a)1, please state how your qualifications represent the communities of interest, neighborhoods, and the diversity in ethnicity, race, age, sex, sexual orientation, gender identity, types of disabilities, and any other relevant demographic qualities of the City and County of San Francisco:

As a gay resident of District 8 in San Francisco, I would represent LGBT interests on the Committee.

Business and/or professional experience:

As Deputy CFO of the SFPUC, I have managed over \$4B in bond sale transactions, attended and presented at numerous municipal finance and treasury conferences, and monitor/manage the SFPUC cash needs which currently represents approximately 30% of the citywide pool.

Civic Activities:

Member Government Finance Officers Assn. (GFOA) Debt Committee
Member Eureka Valley Neighborhood Assn.
Volunteer SPSPCA

Have you attended any meetings of the Board/Commission to which you wish appointment? Yes ☒ No ☐

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (Applications must be received 10 days before the scheduled hearing.)

Date: 10/25/13 Applicant's Signature: (required) 

Please Note: Your application will be retained for one year. Once Completed, this form, including all attachments, become public record.

FOR OFFICE USE ONLY:

Appointed to Seat #: _____ Term Expires: _____ Date Seat was Vacated: _____

01/20/12

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE

100% Recycled
Post Consumer Waste

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
PERL CHARLES MICHAEL

1. Office, Agency, or Court

Agency Name
SAN FRANCISCO PUBLIC UTILITIES COMMISSION
Division, Board, Department, District, if applicable
FINANCIAL SERVICES
Your Position
DEPUTY CHIEF FINANCIAL OFFICER

► If filing for multiple positions, list below or on an attachment.

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

☐ State
☐ Multi-County _____
☒ City of SAN FRANCISCO
☐ Judge or Court Commissioner (Statewide Jurisdiction)
☒ County of SAN FRANCISCO
☐ Other _____

3. Type of Statement (Check at least one box)

☒ Annual: The period covered is January 1, 2012, through December 31, 2012.
-or-
The period covered is _____ through December 31, 2012.
☐ Leaving Office: Date Left _____
(Check one)
☐ The period covered is January 1, 2012, through the date of leaving office.
☐ The period covered is _____ through the date of leaving office.
☐ Assuming Office: Date assumed _____
☐ Candidate: Election year _____ and office sought, if different than Part 1: _____

4. Schedule Summary

Check applicable schedules or "None."

► Total number of pages including this cover page: 3

☒ Schedule A-1 - Investments - schedule attached
☐ Schedule A-2 - Investments - schedule attached
☐ Schedule B - Real Property - schedule attached
☐ Schedule C - Income, Loans, & Business Positions - schedule attached
☐ Schedule D - Income - Gifts - schedule attached
☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or-
☐ None - No reportable interests on any schedule

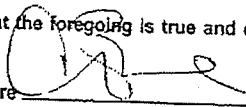
5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)
525 GOLDEN GATE AVE SAN FRANCISCO CA 94102
DAYTIME TELEPHONE NUMBER
(415) 487-5262
E-MAIL ADDRESS (OPTIONAL)
CPERL@SFWATER.ORG

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 03/27/2013
(month, day, year)

Signature 
(File the original signed statement with your filing official.)

SCHEDULE A-1
Investments
Stocks, Bonds, and Other Interests
 (Ownership Interest is Less Than 10%)
 Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
 FAIR POLITICAL PRACTICES COMMISSION

Name
CHARLES PERL

▶ NAME OF BUSINESS ENTITY
APPLE INC

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
COMPUTERS

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / **12** _____ / _____ / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
NORTHROP GRUMMAN CORP

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
AEROSPACE

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
03 / **16** / **12** _____ / _____ / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
CHINA MOBILE LTD

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
TELECOMMUNICATIONS

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
09 / **21** / **12** _____ / _____ / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
BAXTER INTERNATIONAL INC

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
HEALTHCARE

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
09 / **21** / **12** _____ / _____ / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
CHEVRON

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
ENERGY

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
03 / **16** / **12** _____ / _____ / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
SUNTRUST BANKS INC

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
FINANCIAL

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
09 / **21** / **12** _____ / _____ / **12**
 ACQUIRED DISPOSED

Comments: _____

SCHEDULE A-1
Investments
Stocks, Bonds, and Other Interests
 (Ownership Interest is Less Than 10%)
 Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
 FAIR POLITICAL PRACTICES COMMISSION

Name
CHARLES PERL

▶ NAME OF BUSINESS ENTITY
ALLIANT ENERGY CORP

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
ENERGY

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / **12** **08** / **17** / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
ELI LILLY & CO

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
PHARMACEUTICALS

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / **12** **12** / **21** / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
VERIZON COMMUNICATIONS

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
TELECOMMUNICATIONS

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / **12** **09** / **21** / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
VISA

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
FINANCIAL

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / **12** **03** / **16** / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / **12** _____ / _____ / **12**
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / **12** _____ / _____ / **12**
 ACQUIRED DISPOSED

Comments:

TO: Angela Calvillo, Clerk of the Board of Supervisors
FROM: Greg Kato, Policy and Legislative Manager
Office of the Treasurer & Tax Collector
DATE: November 13, 2013
SUBJECT: Motion appointing Charles Perl, term ending June 5, 2017, to the Treasury Oversight Committee

Attached is a copy of the application of Charles Perl to the Treasury Oversight Committee. The Treasurer is appointing Mr. Perl as a member of the public at large.

According to Administrative Code Section 10.80-1(b), "The Committee is established to involve depositors of funds into the City and County Treasury in reviewing the policies for investment of surplus funds that guide the management of their funds and to enhance the security and investment return on those funds by providing a more stable and predictable balance for investment by establishing criteria for the withdrawal of funds."

Mr. Perl is the Deputy Chief Financial Officer of the San Francisco Public Utilities Commission, the largest depositor in the Treasurer's Pooled Fund Portfolio. Mr. Perl oversees the sales of SFPUC bonds and manages the cash needs of the agency. As such he is uniquely qualified to fill the position currently held by Mr. Todd Rydstrom.

Departmental representative to receive a copy of the adopted resolution:

Name: Greg Kato

Phone: 554-6888

Interoffice Mail Address: City Hall Room 140

Certified copy required Yes ☐

No X

(Note: certified copies have the seal of the City/County affixed and are occasionally required by funding agencies. In most cases ordinary copies without the seal are sufficient).

Wong, Linda (BOS)

From: Kato, Greg
Sent: Wednesday, November 13, 2013 9:50 AM
To: Wong, Linda (BOS)
Subject: Charles Perl Treasury Oversight Committee Application - November 21 meeting?
Attachments: CPerlApp2013.pdf; Treasury Oversight Cover Memo CPerl 2013.docx

Good morning Linda-

I believe Charles Perl delivered his application for the Treasury Oversight Committee directly to your office. We are supporting his nomination in place of Todd Rydstrom. Attached is a memo from our office supporting Mr. Perl's appointment and explaining the change from Mr. Rydstrom. If possible could we calendar for the November 21 meeting? Please let me know if you need redlined copies of the motion or other documentation.

Thank you!

Greg M Kato
Policy and Legislative Manager
Office of the Treasurer & Tax Collector
City & County of San Francisco
City Hall - Room 140
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102
Phone: [415/554-6888](tel:415/554-6888)
Fax: [415/554-5507](tel:415/554-5507)
Email: Greg.Kato@sfgov.org
Twitter: @gregkato



Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
(415) 554-5184 FAX (415) 554-7714

RECEIVED
BOARD OF SUPERVISORS
SAN FRANCISCO
2013 OCT 24 AM 10:14
AK

Application for Boards, Commissions, Committees, & Task Forces

Name of Board, Commission, Committee, or Task Force: SF Treasury Oversight Committee

Seat # or Category (If applicable): _____ District: _____

Name: Kevin Crawford

Home Address: 17th Street Zip: 94114

Home Phone: 415- Occupation: VP-Senior Product Manager

Work Phone: 415-975-3519 Employer: Mellon Capital Management Co.

Business Address: 50 Fremont Street, Suite 3900, SF, CA Zip: 94105

Business E-Mail: kevinc@mcm.com Home E-Mail: @yahoo.com

Pursuant to Charter Section 4.101 (a)2, Boards and Commissions established by the Charter must consist of electors (registered voters) of the City and County of San Francisco. For certain other bodies, the Board of Supervisors can waive the residency requirement.

Check All That Apply:

Registered voter in San Francisco: Yes ☒ No ☐ If No, where registered: _____

Resident of San Francisco ☒ Yes ☐ No If No, place of residence: _____

Pursuant to Charter section 4.101 (a)1, please state how your qualifications represent the communities of interest, neighborhoods, and the diversity in ethnicity, race, age, sex, sexual orientation, gender identity, types of disabilities, and any other relevant demographic qualities of the City and County of San Francisco:

I believe that my experiences, both professionally and personally provide me with a unique perspective regarding the role of a committee member. As a gay African American professional, I feel that I reflect both diversity and professionalism in ways that would be beneficial to the city and my public service.

Business and/or professional experience:

- Seasoned investment professional with nearly 20 years' experience, with more than 17 years experience at various San Francisco based companies including the Federal Home Loan Bank of San Francisco, where as a Senior Treasury analyst, I was responsible for managing the Bank's cash flow needs and meeting regulatory requirements.
- Other experience include fixed income investment consulting for Callan Associates and Product management for Mellon Capital.

Civic Activities:

- Former president of the Torgo Alumni network which consists of more than 1,000 minority MBA alumni working in the financial sector.
- MBA interviewer for Robert Torgo Foundation Fellowship

Have you attended any meetings of the Board/Commission to which you wish appointment? Yes ☐ No ☐

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (Applications must be received 10 days before the scheduled hearing.)

Date: 10-22-13 Applicant's Signature: (required)



Please Note: Your application will be retained for one year. Once Completed, this form, including all attachments, become public record.

FOR OFFICE USE ONLY:

Appointed to Seat #: _____ Term Expires: _____ Date Seat was Vacated: _____

Kevin Crawford

17th Street ♦ San Francisco, CA 94114 ♦ 415

@yahoo.com

*Product Management. Investment Consulting. Presentation Refinement.
Product Development. Investment Research and Competitive Analysis*

Knowledgeable, results-driven investment professional with more than 19 years of finance, research and marketing experience from top-tier institutions. MBA and BA degrees from top-tier schools.

Recent Accomplishments:

- Initiated marketing efforts on several of the Mellon Capital's new product offerings including credit long/short, global equity market neutral, multi-strategy, convertible arbitrage and fixed income multi-strategy hedge funds.
- Hosted product trainings for client service, distribution support and compliance teams
- Trained new product manager.
- Contributed to the completion of the firm's fact sheet automation process.
- Revamped firm's marketing collateral.

Professional Experience:

Mellon Capital Management

March 2006 - Present

San Francisco, CA

VP, Senior Product Manager- Product Management

- Effectively communicate Mellon Capital's product attributes and client solutions to the marketplace through written content and collateral materials. Responsibilities include multiple traditional and alternative strategies/vehicles spanning various asset classes.
- Conduct competitive analysis for market intelligence and product development.
- Develop collateral suite for business development needs and act as a liaison for business development/distribution in collateral creation.
- Coordinate and provide support for various internal and external distribution channels, including non-US distribution, Dreyfus, consultant relations and global client service.
- Write and edit product commentaries.
- Create strategic and creative responses for select questions for use in proposals and establish quality standards for RFP responses with the RFP team.
- Develop communication tools/speaking aids for client service, consultant relations, and business development teams.
- Conduct strategy training sessions for various internal departments including distribution, distribution support, compliance and legal.

Callan Associates

January 2000 - February 2006

San Francisco, CA

Investment Consultant - Global Manager Research

- Conducted customized fixed income manager searches for fund sponsors. Worked directly with all plan types. Searches included various U.S. and international fixed income product categories and vehicle types.
- Provided market reviews, manager recommendations and product research to clients
- Provided manager and product support for the firm's client consultants

Kevin Crawford

7th Street ♦ San Francisco, CA 94114 ♦ 415

@yahoo.com

Professional Experience, Continued:

- Researched and monitored over 100 fixed income investment management organizations and products. Research included both in-house and on-site due diligence meetings with investment teams.
- Initiated research coverage for the firm on various fixed income managers with products in emerging market debt, global inflation-linked and leverage loans.
- Conducted competitive analysis and provided advice to fixed income investment managers through the Institutional Consulting Group at Callan Associates.
- Contributed to the quarterly Capital Markets Review publications, Callan Institute's research reports, and Callan Insights.
- Speaker for The Callan College on the manager search process at Callan Associates.
- Panelist for the Institute for International Research and other industry conferences and seminars.

Federal Home Loan Bank of San Francisco

June 1998 – December 2000

San Francisco, CA

Senior Treasury Analyst - Treasury

- Managed the funding needs and maintained the cash flow model. Involved managing various bank leverage and investment ratios, monitoring swap calls, forecasting advance product demand growth, and instructing traders on funding and investment strategies.
- Structured swap transactions for the desired interest-rate gap effect on the bank risk profile.
- Reported monthly to senior management on the Bank's funding activities and investment profitability.
- Maintained the bank's cost of funds model daily.
- Led the Treasury department weekly liquidity/gap meeting and presented updates on projected funding needs.

Spare, Kaplan, Bischel & Associates

1997

San Francisco, CA

Equity Analyst – Research

- Researched companies for investment consideration and analyzed industry data.
- Explored alternative company valuation methods and portfolio optimality strategies.
- Presented weekly on companies in the waste management and tobacco industries

Morgan Keegan & Company, Inc.

June 1994 – August 1996

Memphis, TN

Analyst/Associate - Corporate Finance

- Analyst on corporate finance and M&A transactions in the REIT, healthcare and trucking industries.
- Trained new analysts on financials models and investment concepts.
- Pitched companies for new corporate finance business.
- Designed marketing materials.

Education:

University of California

The Walter A. Haas School of Business

Berkeley, CA

Masters of Business Administration, 1998 – Finance emphasis

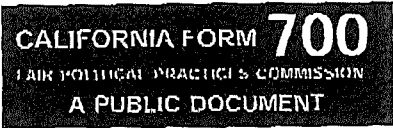
Robert A. Toigo Foundation fellow and former President of the Toigo Alumni Association

Dartmouth College

Bachelor of Arts, 1994

Hanover, NH

History major with Economics emphasis



STATEMENT OF ECONOMIC INTERESTS

RECEIVED
BOARD OF SUPERVISORS
SAN FRANCISCO
Date Received
Original File Only

COVER PAGE

2013 NOV 15 PM 2:01

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Crawford Kevin D.

1. Office, Agency, or Court

Agency Name
Treasury Oversight Committee
Division, Board, Department, District, if applicable
Board of Supervisors - San Francisco
Your Position
candidate for commission appointment

► If filing for multiple positions, list below or on an attachment.

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

☐ State ☐ Judge or Court Commissioner (Statewide Jurisdiction)
☐ Multi-County _____ ☐ County of _____
☒ City of San Francisco ☐ Other _____

3. Type of Statement (Check at least one box)

☐ Annual: The period covered is January 1, 2012, through December 31, 2012.
-or-
The period covered is _____ through December 31, 2012.
☐ Assuming Office: Date assumed _____
☒ Candidate: Election year 2013 and office sought, if different than Part 1: _____
☐ Leaving Office: Date Left _____ (Check one)
☐ The period covered is January 1, 2012, through the date of leaving office.
☐ The period covered is _____ through the date of leaving office.

4. Schedule Summary

Check applicable schedules or "None."

► Total number of pages including this cover page: 1

☐ Schedule A-1 - Investments - schedule attached ☐ Schedule C - Income, Loans, & Business Positions - schedule attached
☐ Schedule A-2 - Investments - schedule attached ☐ Schedule D - Income - Gifts - schedule attached
☐ Schedule B - Real Property - schedule attached ☐ Schedule E - Income - Gifts - Travel Payments - schedule attached
-or-
☒ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
Agency Address Recommended - Public Document
17th Street San Francisco CA 94114
DAYTIME TELEPHONE NUMBER RESS (OPTIONAL)
(415) _____ @mcm.com

I have used reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 11/15/2013
(month, day, year)

Signature
(File the originally signed statement with your filing official.)

San Francisco
BOARD OF SUPERVISORS

Date Printed: November 13, 2013

Date Established:

April 9, 1997

Active

TREASURY OVERSIGHT COMMITTEE

Contact and Address:

Maura Lane
City Hall, Room 316
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

Phone: (415) 554-7502

Fax: (415) 554-7466

Email: maura.lane@sfgov.org

Authority:

San Francisco Administrative Code Article XIII, Sec. 10.80-1 et seq. Originally added by Ordinance 125-97; Admin. Code amended by Ordinance No. 316-00 .

Board Qualifications:

The Treasury Oversight Committee consists of a total of five members, all of whom are nominated by the Treasurer and confirmed by and serve at the pleasure of the Board of Supervisors. Membership is drawn from the following: the county Treasurer; the county Controller, a representative appointed by the Board of Supervisors; the county Superintendent of Schools or his/her designee; the Chancellor of the Community College District or his/her designee; members of the public. A majority of the members shall have expertise in, or an academic background in, public finance; the combination of who shall be economically diverse and bipartisan in political registration. Each member of the Committee shall serve for a term of four years.

A Committee member MAY NOT be employed by an entity that had contributed to a reelection campaign of the Treasurer or a member of the Board of Supervisors in the previous three years and MAY NOT directly or indirectly raise money for the Treasurer or a member of the Board of Supervisors while a member of the Committee, and MAY NOT secure employment with bond underwriters, bond counsel, security brokerages or dealers, or with financial services firms for three years after leaving the committee.

The Committee's purpose is to involve depositors of funds into the City and County Treasury in reviewing the policies for investment of surplus funds that guide the management of their funds and to enhance the security and investment return on those funds by providing a more stable and

"R Board Description" (Screen Print)

San Francisco
BOARD OF SUPERVISORS

predictable balance for investment by establishing criteria for the withdrawal of funds.

Sunset Date: None referenced.

Reports: None referenced.