



## **MACT 2016 Summer Educational Conference Marquette, MI Conference Speaker Biographies**

### **MICHIGAN TAX TRIBUNALS**

**Judge Steven Lasher**

### **TAX AUCTION SALES**

**Natalie Winans**

Ms. Winans is a research associate II at PPA and has extensive experience in the synthesis and visualization of data, as well as in qualitative evaluation design, data collection, analysis, and reporting. In addition to these functions, she works to ensure that all of PPA's work is accurate, compelling, and of high value to clients. Her policy areas of interest include urban revitalization and placemaking, and she also has several years of experience in the evaluation of projects related to workforce development and philanthropy. In all of her projects, Ms. Winans plays a key role in the interpretation and reporting of research findings in formats that are carefully designed and customized to meet client needs while fulfilling PPA's high quality standards. In addition to this work, Ms. Winans has performed a variety of research, reporting, and data visualization activities for the evaluations of the Michigan Food Bank Access to Nutrition Program, the Housing Works initiative in Oregon and Washington State, and the On-Ramps to Career Pathways initiative in Rhode Island, as well as research and strategic planning projects for the Ingham County Treasurer and Land Bank, the Michigan Department of Education, and many others. Ms. Winans holds a bachelor's degree from the University of Michigan and a master's degree in urban and regional planning from Michigan State University. She is a member of the Michigan Association for Evaluation. She serves as chair of the Lansing Historic District Commission, is a co-founder and former board member of the advocacy group Preservation Lansing, and recently served as board member and president of the Historical Society of Greater Lansing.

### **STATE OF MICHIGAN PANEL**

**Howard Heideman**

Mr. Heideman has 39 years experience in state/local tax policy and analysis. He served as staff to the Michigan Senate Finance Committee for nine years and in 1975 worked with county treasurers on tax foreclosure legislation. Howard has managed tax analysis in the Department of Treasury for the past 29 years. Howard has worked with county treasurers, local treasurers, and school districts to implement the Proposal A tax changes. Howard is part of the Office of Revenue and Tax Analysis, which is responsible for economic forecasting, revenue forecasting, revenue tracking, and revenue sharing payments. Howard is a graduate of the University of Michigan, while his wife of 40 years is an MSU graduate. It goes to show that mixed marriages can work. Howard is also once again the proud husband of a Clinton County commissioner.

**Phil Boone**

Phil Boone has worked for the Michigan Department of Education for over 7 years. In his position as a Financial Analyst he works primarily on calculating State School Aid payments for 863 Michigan School districts and public school academies. In addition, Phil has spent the last year working with Department of Technology, Management, & Budget to re-program the payment system using up to date software in order to ensure the long-term viability of the system. Phil holds a bachelor's degree in Business Studies from Davenport University, and an MBA from the University of Michigan.

## **MONEY MARKET REGULATORY REFORM AND IMPACT ON PUBLIC SECTOR**

### **Gregory S. Wright – President**

Greg brings an exceptional history of public funds and Local Government Investment Pool (LGIP) management to his role as President. A founding member of Public Trust Advisors, LLC, he serves as the primary executive with responsibility for overall firm-wide operations. For over a decade, Greg has served as Chief Administrative Officer for COLOTRUST, Colorado's premier LGIP. In his tenure as Chief Administrative Officer for four nationally recognized LGIPs, he managed assets exceeding \$12 billion—serving over 3,000 public shareholders. Under Greg's leadership, these LGIPs experienced record growth in assets under management and participation. He has been an innovator in LGIP-related services, including the use of collateralized, higher yielding bank deposits, electronic marketing initiatives, technology-based solutions, and management of board relations. Greg holds a Bachelor of Arts (BA) and Masters of Arts (MA) from West Virginia University.

### **Todd Alton - Vice President, Credit Research**

Todd joined PTA in 2014 after leading various aspects of the capital markets examination function at the Federal Reserve Bank (FED), where he was in charge of analyzing complex corporations such as General Electric Capital Corp, H&R Block, Mutual of Omaha, and Bank of Oklahoma. While working for the FED, Todd was a contributing member on the Federal Reserve Board panel that developed the municipal credit analysis process for the post Dodd-Frank Act world (i.e. removal of rating agency reliance). Prior to joining the FED, Todd worked for the F.D.I.C and specialized in capital markets examination work, in addition to participating on F.D.I.C. bank closings. Todd's tenure with the FDIC was highlighted by an appointment to the F.D.I.C. emerging risks task force and serving as a fraud examiner during failed bank closings. Todd began his career as a taxable fixed-income trader for CCB Corp, where he focused on executing Federal Agency callable, mortgage-backed, and CMO trades. He was subsequently promoted to several different positions of increasing responsibility, and was ultimately appointed to portfolio manager of the subsidiary bank investment portfolio. Mr. Alton also served as a Vice President in the structured finance unit at Piper Jaffray, and in 2008 was hired to run the commercial mortgage-backed securities (CMBS) workout unit for a private real estate capital markets company, now owned by BGC Partners. Todd earned a commission with both the Federal Reserve and F.D.I.C to legally conduct bank and financial holding company risk examinations and holds the designation of Chartered Financial Analyst (CFA) through the CFA Institute.

## **FUTURE OF INVESTING AND NEW UPCOMING TECHNOLOGY**

### **Gregory Prost**

Greg Prost is the Chief Investment Officer of the Traditional Fixed Income Group at Robinson Capital. He has over 29 years of experience and oversees the core fixed income operation, including directing fixed income strategy and managing institutional portfolios. Greg is a frequent speaker to Michigan Municipal organizations and is a member of the MMTA, MGFOA, and the MACT. He holds an MBA from Western Michigan University, as well as a BA in Economics from Kalamazoo College.

## **TREASURER'S HANDBOOK & CHANGES IN THE DTRF**

### **John Axe**

John R. Axe is a graduate of the University of Michigan (B.A., 1960) and Harvard Law School (L.L.B., 1963). In addition to his experience as a practicing bond attorney and financial consultant in municipal issues, Mr. Axe is a co-author of Michigan Municipal law, a two-volume work published in 1981 by the Institute of Continuing Legal Education for the University of Michigan. In 1992, he was appointed as a member of the Permanent Adjunct Faculty of the Wayne State University Law School where he teaches public finance. Mr. Axe formerly served a three-year term on the Board of Directors of the National Association of Bond Lawyers (NABL), the first Michigan lawyer ever to serve in this capacity. He has served on the Steering Committees for NABL's Bond Attorney's Workshop in the years 1980, 1981, 1983, 1986, 1989 and 1990. In 1976 Mr. Axe incorporated the Michigan Association of County Treasurers and served as its General

Counsel from 1977 – 1988. In 1981, Mr. Axe, with several of his partners at Dickinson, formed the firm of Martin, Axe, Buhl and Schwartz, where he served as the public finance partner. This firm, which in 1985 was known as Axe & Schwartz, merged with Dykema Gossett, taking with it Mr. Axe's extensive public finance practice. With the arrival of Mr. Axe, Dykema Gossett established a public finance practice and department, and he became the head of the Public Finance Department. Effective January 1, 1990, Mr. Axe established John R. Axe and Associates, which was renamed Axe & Ecklund, P.C. effective January 1, 2001. Mr. Axe has, over this period of time, issued his unqualified opinion as bond counsel on more than 1,800 debt issues with a total face amount in excess of \$10 Billion.

## **TREASURERS PANEL**

**Steve Pickens**

**Catherine McClary**

**Sue Pertile**

Sue Pertile has served as Gogebic County Treasurer and Gogebic County Retirement Director since 2005. Prior she served as Payroll Manager at Jacquart Manufacturing, and ten years as Chief Deputy Treasurer for Gogebic County. Sue has an Associate Degree in Accounting. She serves as chairman for the Gogebic County Land Bank Authority, secretary for the Upper Peninsula Association of County Treasurers, a member of the Gogebic Brownfield Redevelopment Authority, is a Certified Public Funds Investment Manager, and treasurer for the Michigan Association of County Treasurer. Ta dah!

## **TREASURERS PANEL**

**Ken Parrish**

Ken Parrish was first elected to serve as the Kent County Treasurer in November 1996. Previously, he served four years as Cascade Charter Township Trustee and four years as Kent County Commissioner, representing Cascade and East Kentwood. Also prior to his election as Treasurer, Ken spent twelve years with Parrish Accounting Service, P.C. as Vice President and Staff Manager. Ken is past President of the National Association of County Collectors, Treasurers and Finance Officers and the Michigan Association of County Treasurers. Ken holds memberships in the Michigan Municipal Treasurers Assn., Government Finance Officers Assn., MGFOA, AICPA and MACPA. Ken serves as chairman of the board of the Kent County Land Bank Authority and Alternative Directions and is a member of the boards of Broadway Grand Rapids, Coffee Dunkers of America and Thebes Players. He holds a Bachelor of Arts degree from Michigan State University and a Master of Business Administration degree from Grand Valley State University. Ken is married to Peggy and between them have five children. In his free time, he enjoys theater, golf, brewing beer and travel.

**Jenny Beemer-Fritzinger**