

## Profile

Larry Fernandes

Have you ever attended a meeting of the advisory board for which you are applying?

☐ Yes ☒ No

If Yes, how many meetings have you attended?

Education

Select the option that applies to your high school education \*

☒ High School Diploma

College/ University A

Name of College Attended

SDSU

Degree Type / Course of Study / Major

B.S. Business

Degree Awarded?

☒ Yes ☐ No

College/ University B

Name of College Attended

SFSU

Degree Type / Course of Study / Major

MBA Business

Degree Awarded?

☒ Yes ☐ No

College/ University C

Name of College Attended

Degree Type / Course of Study / Major

Degree Awarded?

☐ Yes ☐ No

Other Trainings & Occupational Licenses

Larry Fernandes

## Other Training A

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### Certificate Awarded for Training?

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☐ Yes ☐ No

## Other Training B

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### Certificate Awarded for Training?

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☐ Yes ☐ No

### Occupational Licenses Completed:

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## Qualifications and Volunteer Experience

### Please explain why you would like to serve on this particular board, committee, or commission.

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I currently am on the Treasury Oversight Committee for Contra Costa County and given my background feel I would make be a solid addition to the Contra Costa County Employees Retirement Association Board of Retirement.

### Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)

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My career includes three years at Wilshire Associates (a large investment pension consultant) and thirty-three years at Wells Capital Management (an institutional money manager) as a Managing Director in various roles including client relationship management, portfolio management and as a national sales manager. Additionally I chaired a Finance Committee for five years for a charity called Family Aid Catholic Education providing tuition support. And for the last fifteen years I have served on the Investment Committee for the Oakland Diocese. I am stepping this board off at year end.

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Upload a Resume

### Would you like to be considered for appointment to other advisory bodies for which you may be qualified?

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☒ Yes ☐ No

### Do you have any obligations that might affect your attendance at scheduled meetings?

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☐ Yes ☒ No

### If Yes, please explain:

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**Are you currently or have you ever been appointed to a Contra Costa County advisory board?**

☒ Yes ☐ No

**If Yes, please list the Contra Costa County advisory board(s) on which you are currently serving:**

Treasury Oversight Committee

**If Yes, please also list the Contra Costa County advisory board(s) on which you have previously served:**

**List any volunteer or community experience, including any advisory boards on which you have served.**

Chaired the Finance Committee for FACE in the past and I am on the the Investment Committee for the Diocese of Oakland

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### **Conflict of Interest and Certification**

**Do you have a familial or financial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed under the "Important Information" section below or Resolution No. 2021/234)**

☐ Yes ☒ No

**If Yes, please identify the nature of the relationship:**

**Do you have any financial relationships with the County such as grants, contracts, or other economic relationships?**

☐ Yes ☒ No

**If Yes, please identify the nature of the relationship:**

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### **Please Agree with the Following Statement**

**I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and undersand that all information in this application is publicly accessible. I understand that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.**

☒ I Agree

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Important Information

Larry Fernandes

1. This application and any attachments you provide to it is a public document and is subject to the California Public Records Act (CA Government Code §6250-6270).
2. All members of appointed bodies are required to take the advisory body training provided by Contra Costa County.
3. Members of certain boards, commissions, and committees may be required to: (1) file a Statement of Economic Interest Form also known as a Form 700, and (2) complete the State Ethics Training Course as required by AB 1234.
4. Meetings may be held in various locations and some locations may not be accessible by public transportation.
5. Meeting dates and times are subject to change and may occur up to two (2) days per month.
6. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.
7. As indicated in Board Resolution 2021/234, a person will not be eligible for appointment if he/she is related to a Board of Supervisors' member in any of the following relationships:
  - (1) Mother, father, son, and daughter;
  - (2) Brother, sister, grandmother, grandfather, grandson, and granddaughter;
  - (3) Husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepson, and stepdaughter;
  - (4) Registered domestic partner, pursuant to California Family Code section 297;
  - (5) The relatives, as defined in 1 and 2 above, for a registered domestic partner;
  - (6) Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or business associate.



Please explain why you would like to serve on this particular board, committee, or commission.

I am currently on this board as an alternate.  
I can add value given my background  
in finance, investments and management.  
In the past I have asked questions  
during these meetings and would add more  
as a voting member

Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume).

— see education and experience

I am including my resume with this application:

Please check one: ☒ Yes ☐ No

Are you currently or have you ever been appointed to a Contra Costa County advisory board?

Please check one: ☒ Yes ☐ No

If Yes, please list the Contra Costa County advisory board(s) on which you are **currently** serving:

Treasury Oversight Committee - Alternate Board Member

If Yes, please also list the Contra Costa County advisory board(s) on which you have **previously** served:

List any volunteer and community experience, including any boards on which you have served.

Do you have a familial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed under the "Important Information" section on page 3 of this application or Resolution No. 2021/234).

Please check one: ☐ Yes ☒ No

If Yes, please identify the nature of the relationship:

Do you have any financial relationships with the county, such as grants, contracts, or other economic relationships?

Please check one: ☐ Yes ☒ No

If Yes, please identify the nature of the relationship:

## LARRY FERNANDES

Walnut Creek, California 94598

### **SUMMARY**

Senior asset management executive with managerial and direct business development and client relationship experience. Motivated by learning and new challenges seeking a leadership position including combined sales and service teams targeting a focused client segment. A proven and successful strategic thinker who works through challenges and builds out and executes a plan to achieve success. Hands on leader who works directly with clients and prospects understanding their needs to then provide appropriate solutions. Passionate about diversity, financial literacy and education.

### **PROFESSIONAL EXPERIENCE**

#### **WELLS FARGO ASSET MANAGEMENT**

**San Francisco, CA**

*Executive Vice President, Managing Director*

*1987 - 2020*

*National Sales Manager – Balance Sheet & Insurance Asset Management*

*1999 – 2020*

Manage a 16 member team providing investment solutions for institutional clients balance sheet pools

- Expanded and built out the team in line with organizational growth in scale, capabilities and scope
- Added mutual funds and private placement structures in addition to separate account capabilities to meet client demand
- Managed teams, product offerings and business through multiple interest rate cycles and various organizational changes
- Launched cross sell efforts with the Wholesale Bank at Wells Fargo increasing the opportunity set and our success rate

#### *Selected Achievements*

My team exceeded our sales goal 17 of 20 years and in the years we fell short we always exceeded 90%+

Rebranded the team Balance Sheet Asset Management Sales with additional focus beyond short duration

- Started the insurance asset management sales practice moving us up into a top 12 status
- Embraced on a long duration goal for the team with added focus on captives, banks & healthcare

*Senior Vice President, Client Relationship Management Manager – Liquidity Management Team*

*1996 - 1999*

Managed a team of 5 relationship managers focused on providing separate account fixed income solutions for balance sheet asset pools. Managed the team through multiple mergers including First Interstate and Norwest Bank.

*Vice President, Relationship Manager – Liquidity Management Team*

*1990-1996*

Built and managed 37 client relationships of institutional clients for the Liquidity Management team in partnership with client administration, portfolio management and business development. Maintained and grew my book of business as a top performer.

*Assistant Vice President, Portfolio Manager – Wealth Trust Division*

*1987-1990*

Managed high net worth trust clients' portfolio asset allocations into diversified trust funds from other unique structures. Implemented operational efficiencies that resulted in better client return results.

#### **WILSHIRE ASSOCIATES**

**Santa Monica, CA**

*Investment Consulting Group*

**Senior Research Analyst Manager**

*1986-1987*

Managed research analyst team of eight supporting the investment consultant group.

**Research Analyst**

*1984-1986*

Created effective quarterly client meeting reports and worked on special projects for the consultant team.

### **EDUCATION & ADDITIONAL EXPERIENCE**

**San Francisco State University**

**San Francisco, CA**

*Master of Business Administration - Corporate Finance and Business Management*

*1990*

**San Diego State University**

**San Diego, CA**

*Bachelor of Science - Business Administration, Emphasis Finance Minor: Psychology*

*1984*

-Chair Finance Committee for Family Aid Catholic Education, Investment Committee Member Oakland Diocese and

Member Treasury Oversight Committee for Contra Costa County

-FINRA Series 6, 82, 63, 26 and 24 Licensed

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publicly accessible. I understand and agree that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.

Signed:

Date:

2/22/22

**Submit this application to:** [ClerkofTheBoard@cob.cccounty.us](mailto:ClerkofTheBoard@cob.cccounty.us) **OR** Clerk of the Board  
1025 Escobar Street, 1st Floor  
Martinez, CA 94553

*Questions about this application? Contact the Clerk of the Board at (925) 655-2000 or by email at [ClerkofTheBoard@cob.cccounty.us](mailto:ClerkofTheBoard@cob.cccounty.us)*

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