

# Application Form

## Profile

Larry \_\_\_\_\_ Fernandes \_\_\_\_\_  
 First Name Middle Initial Last Name

Home Address \_\_\_\_\_ Suite or Apt \_\_\_\_\_  
 Walnut Creek \_\_\_\_\_ CA \_\_\_\_\_ 94598  
 City State Postal Code

Primary Phone \_\_\_\_\_

Email Address \_\_\_\_\_

### [District Locator Tool](#)

#### Resident of Supervisorial District:

District 4

Retired \_\_\_\_\_  
 Employer Job Title

#### Length of Employment

#### Do you work in Contra Costa County?

Yes  No

#### If Yes, in which District do you work?

#### How long have you lived or worked in Contra Costa County?

35 years

#### Are you a veteran of the U.S. Armed Forces?

Yes  No

## Board and Interest

#### Which Boards would you like to apply for?

Contra Costa County Employees Retirement Association (CCERA): Submitted

#### Seat Name

Appointee #4

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?**

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## **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

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### **College/ University C**

**Name of College Attended**

**Degree Type / Course of Study / Major**

**Degree Awarded?**

Yes  No

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## **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:**

### **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.



Contra Costa County

Print Form

Please return completed applications to: Clerk of the Board of Supervisors 1025 Escobar Street, 1st Floor Martinez, CA 94553 or email to: ClerkofTheBoard@cob.cccounty.us

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

First Name: Larry Middle Initial: Last Name: fernandes State: CA Postal Code: 94598
Do you work in Contra Costa County? Yes No
Current Employer: Job Title: Length of Employment:
How long have you lived or worked in Contra Costa County? 33 yrs

Board, Committee, or Commission: Treasury Oversight Committee Seat Name: Public Representative
Have you ever attended a meeting of the advisory board for which you are applying? Yes No

EDUCATION

Check appropriate box if you possess one of the following: High School Diploma CA High School Proficiency Certificate G.E.D. Certificate
Colleges or Universities Attended: SDSU, SFSU Degree Type/ Course of Study/Major: B.S. Business, MBA Business Degree Awarded: Yes No
Occupational Licenses Completed: Other Trainings Completed: Certificate Awarded for Training?

Do you have any obligations that might affect your attendance at scheduled meetings? Yes No
If Yes, please explain:

Would you like to be considered for appointment to other advisory bodies for which you may be qualified? Yes No
Are you a veteran of the U.S. Armed Forces? Yes No

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:

**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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