



Town of Highland Beach
Town Clerk's Office
3614 S. Ocean Boulevard
Highland Beach, Florida 33487
Phone: (561) 278-4548 Fax: (561) 265-3582

RECEIVED

OCT 27 2022

Town of Highland Beach, FL
Town Clerk's Office

BOARDS AND COMMITTEES APPLICATION

This information is for consideration of appointment to a Town Board. Please complete and return this form to the Town Clerk, along with your *resume and proof of residency such as a government issued identification or voter registration card.*

PLEASE NOTE: Florida Public Records Law is very broad. Documents relevant to town business is public records and is subject to public disclosure upon request. Your information provided within this application may therefore be subject to public disclosure.

NAME: Joshua Davison PHONE: 305-984-3625

HOME ADDRESS: 1015 Russell Drive APT. NO. D

SUBDIVISION: Shamrock I Condominium EMAIL ADDRESS: jdavison0815@gmail.com

PLEASE SELECT THE BOARD(S) / COMMITTEE(S) ON WHICH YOU ARE INTERESTED IN SERVING IN NUMERICAL ORDER FROM 1 THROUGH 7, WITH 1 BEING YOUR FIRST CHOICE AND 7 THE LEAST CHOICE. (A description of the responsibilities of each Board is on the back of this application.)

- | | |
|--------------------------------------------------------|---------------------------------------------------------------|
| <input type="checkbox"/> Board of Adjustment & Appeals | <input type="checkbox"/> Code Enforcement Board |
| <input type="checkbox"/> Financial Advisory Board | <input type="checkbox"/> Natural Resources Preservation Board |
| <input type="checkbox"/> Planning Board | <input type="checkbox"/> 1 Town Commission *** (If vacancy) |
| | <input type="checkbox"/> Other Board /Committee |

PLEASE MARK YES OR NO FOR EACH OF THE FOLLOWING QUESTIONS:

Are you a resident of Highland Beach?	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Are you a registered voter in Highland Beach/Palm Beach County, FL?	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Are you currently serving on a Town Board?	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Have you ever served on a Town Board/Committee?	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>

If Yes, please indicate the Board(s)/Committee(s) and dates of service:

Natural Resources Preservation Advisory Board

Are you willing to attend monthly board meetings? In (Person / Teleconference) Yes ☒ No ☐

Per Town Code of Ordinance, I understand any member absence from three (3) consecutive meetings will be considered as resignation from the board/committee. Yes ☒ No ☐

Please list any special talent, qualification, education, or professional experience that would contribute to your service on the Board/Committee you have selected?

*Accomplished Investment Product and Financial Services Industry Consultant; 19+ years experience
*Knowledge of a wide array of investment vehicles
*Financial technology software implementations for small and large financial institutions
*Business owner with experience hiring, managing, growing, and coaching peers

Please summarize your volunteer experience(s):

Current Natural Resources Preservation Advisory Board member
40 Ocean volunteer
~~Central Florida Alzheimer's Association Board member~~
Central Florida Kiwanis member
Fundraiser for: Movember, ASPCA, Habitat for Humanity, Gift of Life

Florida Law requires appointed members on the Planning and Board of Adjustment and Appeals Boards to file a Form 1 - Statement of Financial Interests Disclosure form on an annual basis.

Vetting by the Board Chairperson. The Chairperson of each Board shall interview the applicant and submit a memorandum of recommendation to the Town Clerk's Office 14 days prior to the Town Commission Workshop Meeting for final appointment.

Palm Beach County Commission on Ethics requires appointed members to take the Code of Ethics Training every two (2) years.

I hereby certify that the statements and answers provided are true and accurate to the best of my knowledge.



Signature of Applicant

10.24.22

Date

☒ Resume Attached

JOSHUA A. DAVISON, CIMA®

305 984 3625

CERTIFIED INVESTMENT MANAGEMENT ANALYST®

jdavison0815@gmail.com

[linkedin.com/in/joshuadavison](https://www.linkedin.com/in/joshuadavison)

WORK EXPERIENCE

Connectus Wealth (Focus Financial Partners - NASDAQ:FOCS)

West Palm Beach, FL

Director, Investment Strategy & Portfolio Manager

2022 – Present

- Consultant for our global consortium of Registered Investment Advisory (RIA) partners responsible for Portfolio Management & Investment Strategy collaboration
- Project Manager to develop and execute new strategies across research, trading, investment strategy and selection.

Berbert J. Sims

Boca Raton, FL

Director of Investments

2018 – 2022

- Project Manager for strategy implementation of a new wealth management program. 500% growth in AUM over initial 12 month period
- Created Advisory Board program to encourage organic growth with existing Advisors; Successfully aided in converting 20% of existing client assets to new program via client meetings, webinars, and speaking engagements
- Firm-wide Wealth Management consultant for over 50 Advisors; Assisting in development of asset allocation and investment plans for clients; Business plan development and sales process coaching
- Leads investment product training, rollout, and marketing support to garner buy-in from Executives & Advisors
- Portfolio Manager for 5 Asset Allocation Models, 3 All Equity All ETF Models, & 2 All Bond All ETF Models
- Investment due diligence and ongoing research of investment products including Alternatives and Insurance

The Lubitz Financial Group

Miami, FL

Investment & Client Operations Manager

2012 – 2018

- Oversee investment due diligence and select appropriate funds for client portfolios based on proprietary quantitative models and qualitative fundamental analysis; Develop client presentation materials
- Actively advise on the firm's overall strategic direction as member of the senior management committee and direct the firm's client services efforts. Led various firm initiatives including the following:
 - Overhauled fixed income and alternatives allocation in the quantitative investment model that reduced historical risk by 200 bps, raised returns by 125 bps, and lowered expenses by 25 bps
 - Recommended new fee schedule based on research of regional competitors that increased the firm's overall revenue by 18%
- Present research findings and educational material to current and prospective clients; oversee client services best practices in order to optimize the clients' experience across all aspects of the firm

Charles Schwab & Co.

Orlando, FL

Senior Relationship Specialist

2009 – 2012

Morgan Stanley

Orlando, FL

Financial Advisor

2007 – 2008

EDUCATION

University of Central Florida

Orlando, FL

B.S.B.A Finance

Class of 2006

**Relevant Coursework: Investment Analysis, Financial Markets, Derivatives, Quantitative Business Tools*

ADDITIONAL INFORMATION

Computer: Advanced Excel & Powerpoint, Hidden Levers, Bloomberg, Morningstar, FactSet, Schwab, Fidelity, Pershing, TD, Orion, eMoney, MoneyGuidePro, Salesforce, Tamarac, Redtail, Junxure, Addepar, RedBlack, Practifi, AdvisorEngine, Egnyte, Trello, Docupace, CAIS, iCapital

Certifications: CIMA® designation, FINRA 66, 7, 24 & Florida 2-15 Insurance

Volunteering: November Fundraiser, former Alzheimer's Asso. of Central FL Board Member, Gift of Life

Interests: Auto Enthusiast, Captain/Fishing/Water Sports, Athletics/Health, Music/Concerts