

## Joshua Benson, CPA

• Milwaukee, WI 53222

### Experience

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**City of Milwaukee - Milwaukee, WI**

*August 2022 – Present*

*Capital Finance Manager*

- Manages the aggregate \$1.8 billion debt program for the City of Milwaukee and Milwaukee Public Schools (MPS)
- Structures, sizes, and prices borrowing to implement the capital budget in compliance with statutory and ordinal requirements
- Establishes short term liquidity facilities and utilizes them to maintain sufficient cash flow for the City and MPS as needed
- Ensures City compliance with borrowing covenants and IRS and SEC regulations, including continuing disclosure filings
- Staffs all meetings of the City's Public Debt Commission (PDC)
- Drafts all required borrowing resolutions and testifies to the Finance and Personnel Committee and the PDC
- Prepares and presents to the PDC annual reports for Debt and Debt Service and Public Debt Amortization Fund Financials
- Manages relationships with outside professionals including banks, investors, rating agencies, lawyers, and others

**City of Milwaukee - Milwaukee, WI**

*April 2020 – August 2022*

*Deputy Comptroller*

- Was responsible for the management and execution of all divisions within the Comptroller's Office, which administers the City's financial affairs, exercising fiscal control over the activities of approximately 40 City departments and agencies
- Collaborated with the elected Comptroller to determine and implement the strategic vision of the Office
- Acted as Human Resources Officer for a team of 50+ staff members
- Assumed the duties of the Comptroller as needed, carrying out all legal duties and responsibilities

**City of Milwaukee - Milwaukee, WI**

*July 2017 – April 2020*

*Senior Financial Analyst*

- Analyzed and assisted in the management of the City's public debt program in order to implement the capital budget
- Drafted and reviewed resolutions, bond disclosure filings, official statements, and other City documents
- Performed feasibility analysis of the City's tax incremental districts by modeling projected increment revenues and expenses
- Reviewed developer agreements, project plans, PILOT agreements, and other documents to ensure the City's goals were met
- Coordinated with City departments to prepare and monitor revenue estimates, debt service, and debt issuance budgets
- Collaborated with the budget office to evaluate budget amendments and verify the City's tax levy
- Assisted in the preparation and presentation of various citywide financial reports

**Public Financial Management, Inc. - Milwaukee, WI**

*June 2012 - July 2017*

*Senior Analyst*

- Provided technical and quantitative support to assist clients in accessing the capital markets for municipal bond issuances
- Structured, sized, and priced municipal bond obligations, created or reviewed related legal documents
- Assessed outstanding debt to identify opportunities to save taxpayer money through refunding bonds
- Provided cash flow and rate setting analysis for several large water and sewer entities throughout the Midwest
- Utilized excel skills by modeling future cash flows from various revenue streams and payment obligations
- Assisted in providing tax increment financing advice, including reviewing project plans and modeling cash flows

### Education and Certifications

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**University of Wisconsin - Madison**

*Graduation Date: May 20, 2012*

Bachelor of Business Administration Degree

**Double Major:** Finance, Investment, and Banking; Chinese

**Certifications:** Certified Public Accountant; Passed Series 50 Municipal Advisor Representative Exam

### Activities

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**Milwaukee Artist Resource Network**

*July 2018 – July 2019*

*Treasurer*

**University of Wisconsin – Madison Capital Management Club**

*September 2011 – June 2012*

*Portfolio Analyst*