



Appointments:

Milwaukee County Pension Board

February 2020-January 2023

- Board Member
- Member of Investment Committee
- Member of Governance Committee

Annuity and Pension Board

City of Milwaukee Employees' Retirement System

June 2017-June 2018

- Board Member
- Member of Investment Committee
- Member of Administration and Operations Committee

Experience:

Self Employed

October 2018-present

- Hotel Assets Management and Operations
- Consultant for purchase/sale of hotels
- Accounting and Financial Reporting for small businesses

Milwaukee Public Schools

Chief Human Resources Officer

July 2017-October 2018

Acting Chief Human Resources Officer

February 2017-July 2017

Senior Director of Benefits and Compensation

April 2017-July 2017

Manager – Pensions and Data Systems

October 2011-April 2017

Senior Pension Specialist

September 2001-October 2011

Pension Specialist

March 1997-September 2001

Responsible for the administration and reporting of following plans for Milwaukee Board of School Directors:

- Employee Trust Funds – Wisconsin Retirement System (WRS)
- City of Milwaukee – Employees' Retirement System (ERS)
- Early Retirement Supplement and Benefit Improvement Plan (Administrators Supplemental Plan)
- Supplemental Early Retirement Plan for Teachers (Teachers Supplemental Plan)
- 403(b) Tax Sheltered Plan and 457 Deferred Compensation Plan
- Health, Dental, Vision, Life Insurance and Leave Benefit plans
- Short-term and Long-term disability programs

Work with ERS and WRS on an on-going basis on enrollments, payroll reporting, ordinary and work disabilities and annual actuarial and audit reports. Participated in the issuance of bonds to pay off WRS past service liability.

Administer both Supplemental Pension Plans and work with plan actuary, city attorney and auditors. Responsible for re-balancing investments between State of Wisconsin Investment Board and BMO Trust Company. Work with investment consultant to ensure compliance with MPS Investment Policy and legal counsel on IRS filings for both Supplemental Pension Plans.

Administer MPS Health, Dental, Vision, Life and Disability Plans for active and retired employees.

Worked as functional lead for the implementation, development and support of Human Resources Management System (HRMS) – PeopleSoft. Lead sponsor for MPS HRMS and Financial Systems.

City of Milwaukee – Employees' Retirement System

Accountant

January 1995 – March 1997

Worked with Chief Investment Officer and Deputy Director on Investment accounting. Implemented Financial Accounting software ACCPAC. Converted benefit calculation worksheets to Excel spreadsheets. Prepared financial statements and worked with ERS auditors and Northern Trust Company.

Education:

Master's degree in Cost and Management Accounting
Tax courses at University of Wisconsin, Milwaukee WI
Certified Public Accountant, Wisconsin

Elected position: *Hindu Temple of Wisconsin*, Pewaukee WI

Board Member

December 1999 – December 2023

Served on Executive Committee

- Board President
- Vice President
- Treasurer