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Rees Petersen

Constituent Information

Name	Rees Petersen	Contact Record Type	Applicant
Middle Initial		Account Name	
Title		Status	
Council District	4	Gender	Male
# of Board Memberships	0	Ethnicity	White/Caucasian
Qualifications	Passion for science and for hands on teaching about space and science Strong skills in financial statement analysis Connected to	Diversity	
Member Id		Comments	
		Other	

Contact Information

Send mail to		Mobile	
Home Phone		Other Phone	
Phone		Business Phone	
Fax		Business Fax	
Email		Business Email	
Mailing Address		Other Address	
Created By	Boards and Commissions Liaison, 5/11/2018 11:52 AM	Last Modified By	Boards and Commissions Liaison, 5/11/2018 11:52 AM
Description			

Activity History

Email: Application Successfully Submitted

Related To	APP00004164
Task	<input checked="" type="checkbox"/>
Due Date	5/11/2018
Assigned To	Boards and Commissions Liaison
Last Modified Date/Time	5/11/2018 11:52 AM
Comments	<p>To: reespete@comcast.net</p> <p>CC:</p> <p>BCC:</p> <p>Attachment: --none--</p> <p>Subject: Application Successfully Submitted</p> <p>Body:</p> <p>Thank you for your submission. We appreciate your interest in Salt Lake County's Boards and Commissions process. We have received your application and are submitting it for review and consideration to the appropriate board coordinator. We will be in contact with you shortly for the next steps involved in the selection process. If you are selected for an interview, you can expect a phone call from the Board Coordinator.</p> <p>Thank you, again, for your interest in serving. We do appreciate the time you invested in this</p>

application.

Regards,

Salt Lake County Boards & Commissions

boards@slco.org

Applications

APP00004164

Board **Clark Planetarium Advisory Board**

Date **5/11/2018**

Notes & Attachments

RLP Resume 2016.docx

Type	Attachment
Last Modified	Boards and Commissions Liaison
Description	View file

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Rees L. Petersen, CFA

Mobile
Office

BACKGROUND SUMMARY

Over 29 years of diversified and progressive experience in the investment management industry. Demonstrated the successful application of financial knowledge and relationship management skills in positions of increasing responsibility.

PROFESSIONAL EXPERIENCE

Wells Fargo
Salt Lake City, Utah

November 1996 to Present

Senior Vice President, Regional Investment Manager, Wells Fargo Wealth Management
October 2008 to present

Leads a team of 5 Investment Strategists and one Investment Associate. Follows through to confirm adherence to established direction, policies, and guidelines. Coaches and tracks progress to business plan. Manages investment portfolios for clients with trust, IRA, and investment management accounts.

- Coaches investment strategists to work with teams to meet sales goals
- Monitors and manages for completion of risk management objectives
- Coordinates business management with counterparts from Trust, Private Banking and Brokerage
- Presents economic outlook and market strategies to clients and team members.

Vice President, Senior Investment Manager, Wells Fargo Private Client Services
April 1999 to October 2008

Managed investment portfolios for clients with trust, IRA, and investment management accounts. Served as the Regional Investment Manager and acted as the Team Leader for Investment Management in the office prior to acquisition of First Security Bank. Performed role as Sector Head for the research process. Acted as relationship manager for client accounts.

- Managed client portfolios with four-asset class diversification.
- Reported investment performance to clients as well as economic outlook and strategy.
- Gathered new accounts and assets for management.
- Analyzed an equity market segments and wrote opinions.

Assistant Vice President, Portfolio Manager, Wells Fargo Private Client Services
November 1996 to April 1999

Responsible for managing investment portfolios for clients.

- Managed client portfolios totaling more than \$450 million in account assets.
- Reported investment performance to clients as well as economic outlook and strategy.
- Managed additions, deletions, and rebalancing to a model portfolio used in analyzing equity investments.
- Brought in new assets and accounts to the office.

Fidelity Investments
Salt Lake City, Utah

November 1990 to March 1996

Director--Client Management, Fidelity Tax-Exempt Services Company

January 1995 to March 1996

Responsible for client relationships and ongoing service provided to 140 retirement plans of nonprofit institutions representing over \$4 billion in assets. Supervised one Manager and 16 Account Managers.

- Maintained 100% client retention from 1991 to 1996.
- Served as project manager for rolling out a Self-Directed Brokerage investment option to the first Fidelity client to offer this service to plan participants.

Director--Retirement Recordkeeping, Fidelity Investments Tax-Exempt Services Company

January 1993 to December 1994

Maintained client relationships and ongoing recordkeeping for 94 retirement plans of non-profit Institutions, representing over \$2 billion in assets. Directed two Managers who worked with Account Managers, Auditors, and Processors, a total of 30 associates. Worked as part of a team to re-engineer the workflow of processes and procedures used by the client services group.

Manager--Retirement Recordkeeping, Fidelity Investments Tax-Exempt Services Company

September 1991 to December 1992

Responsible for client relationships and ongoing recordkeeping for 75 retirement plans of non-profit institutions, representing over \$1.3 billion in assets. Directly managed the work of 16 associates and was consistently successful in maintaining and improving client relationships.

Manager--Participant Services, Fidelity Investments Tax Exempt Services Company

April 1990 to August 1991

Managed two groups, totaling 17 representatives, responsible for handling inbound calls from retirement plan participants and for resolving monetary and non-monetary account problems.

EDUCATION / TRAINING

- Chartered Financial Analyst (CFA) charter holder (2003)
- Certified Investment Management Consultant (CIMC) (2003)
- MBA - David Eccles School of Business - University of Utah, Salt Lake City, Utah (2002)
- BA Finance - University of Utah, Salt Lake City, Utah (1986) - Emphasis in Investment
- Management, Minor in Spanish
- Certified Employee Benefits Specialist (CEBS) - Sponsored by the International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania (1996)
- Registered Principal, Series 24 (1991) - (NASD)
- NYSE Registered Representative, Series 7 (1988) - NASD
- Registered Representative, Series 6 & 63 (1987) - NASD
- Current Vice-Chair of the Board of the Clark Planetarium, Salt Lake City, Utah
- Past President of the CFA Society of Salt Lake
- Past Board Chair of Ten Thousand Villages, Utah - a non-profit fair trade retailer
- Opinions on General Electric (GE) stock quoted several times in the Wall Street Journal "Heard it on the Street" column and on the MSN Money site.



Board Appointment Approval

Ben McAdams

Salt Lake County Mayor

Erin Litvack

Deputy Mayor, County Services

Rick Graham

Deputy Mayor, Operations

Karen Hale

Deputy Mayor, Community
& External Affairs

Darrin Casper

Deputy Mayor, Finance
& Administration

On the 17th day of July 2018 the Salt Lake County Council consents to the appointment of Mr. Rees Petersen as a member of the *Clark Planetarium Advisory Board*.

His three-year term began July 1, 2018 and will end June 30, 2021.

Salt Lake County Council

Aimee Winder Newton
Chair, Salt Lake County Council

Attest:

Sherrie Swensen, County Clerk

Please instruct the Council Clerk to return this form to Anna Vukin-Chow in the Mayor's Office, N2- 100 to process this appointment.