



SANTA BARBARA
FOUNDATION

2019 INVESTMENT COMMITTEE

FOR ALL SANTA BARBARA COUNTY COMMUNITIES

JENNIFER MURRAY

Investment Committee Chair

Financial Advisor, Morgan Stanley Smith Barney, Global Wealth Management Group, Santa Barbara Foundation Trustee

Prior to joining Morgan Stanley Smith Barney, Jennifer Murray worked as a principal consultant for Price Waterhouse. Jennifer has also worked as a senior auditor for Arthur Andersen. She holds a Bachelor of Science degree in business administration and accounting from CSU, Fresno and is a certified public accountant and certified financial planner. In addition, Jennifer is on the Investment Committee of the Santa Maria Valley Discovery Museum and a member of the Women's Fund of Northern Santa Barbara County. She is a volunteer at the Scholarship Foundation of Santa Barbara and St. Louis de Montfort School. Jennifer has also been a Youth Making Change mentor. She was part of the 2003/4-2005 class of Katherine Harvey Fellows and was a Santa Barbara Foundation Santa Maria Affiliate member for six years.

STEVE BROWN

Principal and Founding Partner, Radius Commercial Real Estate

Steve Brown is a principal and founding partner at Radius Commercial Real Estate & Investments and is a licensed California Real Estate Broker. For the past 43 years, Steve has been involved in sales and leasing transactions involving commercial, multifamily and industrial properties worth well over \$1 Billion in the tri-counties area.

Steve specializes in analyzing investment properties and representing buyers and sellers in the purchase and sale of these properties. Some of Steve's clients include the Santa Barbara Foundation, Hutton Foundation, Atlantico Corporation, Mission Linen Supply, Young Construction, West Coast Asset Management, County of Santa Barbara, City of Santa Barbara, Goleta Union School District, Hewlett Packard, Microsoft, and others.

Steve graduated from UCSB in 1970 with a Master's of Science degree and has been a guest lecturer at Santa Barbara City College, UCSB and the Santa Barbara Board of Realtors, as well as a moderator at the annual Radius Economic forecast. He is also a member of Santa Barbara Toastmasters and the Santa Barbara Chamber of Commerce.

NORM HABERMANN

COO or CEO of Multiple Major US Food Companies, Santa Barbara Foundation Finance Committee Member

Norm Habermann was a former COO or CEO of a number of major New York Stock Exchange companies over a span of 30 years including Kentucky Fried Chicken, Collins Foods International, Denny's and Fine Host Corporation. Thereafter, he became President and CEO of W.R. Grace's food group which included ownership of over 1,000 full service restaurants in a variety of food categories. Later, with a group of financial partners, they acquired the Group in a leveraged buyout.

In his early career, Norm was in the management consulting world. He holds a Bachelor of Arts degree from Rutgers University and an MBA from Golden Gate College. Prior to entering the business world he served as a Lieutenant in the United State Navy. He has served on a number of corporate and civic boards and has been a Trustee of the UC Santa Barbara Foundation since 1986 and served as chair for 1996-1997.

KEVIN O'BAR

Former Financial Advisor, Wells Fargo

Kevin O'Bar worked as a Financial Advisor at Wells Fargo (Legacy) in Santa Barbara for 42 years. He managed and developed investment portfolios for his clients to help them meet their financial goals. Kevin also managed the local Wells Fargo office for 5 years, which included the oversight of 10 financial advisors and support staff. In his early years, Kevin was in advertising sales for the Los Angeles Times for 3 years and was a Manpower Analyst for Volunteers in Service to America (VISTA), in Nashua, New Hampshire for a year. He holds a Bachelor's of Arts in Economics from the University of California, Santa Barbara.

SUSAN T. RICHARDS

Former Attorney and Stockbroker

Susan Richards was instrumental in the growth of The Community Foundation serving Boulder County, Colorado for the past 20 years. During this time, she served in several key positions from legal to financial to board chairperson. After relocating to Santa Barbara, Susan immediately became active with the Santa Barbara Foundation. She has served on the foundation's development task force and is a member of Social Venture Partners Santa Barbara. Susan holds a bachelor's degree in economics, a master's degree in business administration, and a Juris Doctor degree from the University of Colorado, Boulder. She has enjoyed a successful career as a stockbroker and an attorney, practicing in the areas of estate planning, real estate, and business.

ROBERT L. SKINNER

Former Chief Innovation Officer/General Counsel, Montecito Bank and Trust

Robert Skinner was the chief innovation officer and general counsel for Montecito Bank & Trust, the oldest locally owned and operated community bank in Santa Barbara County, with assets in excess of \$1 billion. He is also a member of the bank's board of directors and serves as the chair of its trust committee. In addition to his responsibilities at the bank, Robert also serves as executive vice president and general counsel for The Towbes Group, Inc., a Santa Barbara-based property management and development company; managing member of Towbes Capital Partners, LLC, a real estate investment company; and founding member and chief executive officer of Agility Capital, LLC, a venture debt fund. Robert is a graduate of the University of Southern California, receiving a Bachelor of Science degree in business administration/marketing and a Juris Doctor degree.

TRACY P. STOUFFER, CFA

Former Senior Vice President and Portfolio Manager, Nuveen Investments

Tracy was the manager of Nuveen's International Growth Strategy and co-manager of the Global Growth Strategy and related institutional portfolios. For both strategies, she took over portfolio management responsibilities in 2009. Tracy began working in the financial industry in 1981 and joined the firm in 2008. Previously, she was a managing partner at WayMark Capital, LLC, a development stage company. Prior to that, she was an international portfolio manager for several firms, including Dreyfus Founders Funds, Federated Global Investment Management, Clariden Bank (Credit Suisse), and TIAA-CREF. Tracy earned an A.B. from Cornell University and an M.B.A. from the University of Western Ontario. She holds the Chartered Financial Analyst designation and is a member of the CFA Institute. She is a volunteer with Habitat for Humanity, the Food Bank of Santa Barbara County and is a sustainer on the Women's Board of the Santa Barbara Museum of Art.

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TOM PARKER

President, Hutton Parker Foundation

Tom Parker is currently chairman of the board of the Hutton Companies and president of the Hutton Foundation. He is responsible for all fiscal and operational management at the Hutton Foundation as well as its holdings. He manages all stock market and real estate investments including the Foundation office located in Santa Barbara, California and the property management organization located in Orange, California.

CHUCK SLOSSER, PhD

Senior Fellow with The Philanthropic Initiative, Former CEO of the Santa Barbara Foundation

Chuck Slosser has spent more than 35 years in various positions within the nonprofit sector. Most recently, he became a senior fellow with The Philanthropic Initiative (TPI), a nonprofit consulting firm based in Boston that serves the needs of foundations (corporate, family, private, operating, and community foundations). Prior to joining TPI, Chuck was president & CEO of the Santa Barbara Foundation for 18 years. He remains a consultant to the Santa Barbara Foundation, is a trustee of the Hutton Foundation, a member of the philanthropy board of Reiter Affiliated Companies, a board member of PlanitNow (a national nonprofit that focuses on weather related disaster preparedness), chair of the Audit Committee of the Wood-Claeysens Foundation, a member of the Investment Committee of the Visiting Nurse Association, and emeritus member of The Foundation Roundtable. Chuck completed his undergraduate studies in political science at Valparaiso University in Indiana and received a PhD in history from UCLA.

BILL VILLA

Former Director of Admissions, UC Santa Barbara

Bill Villa is a seventh generation Santa Barbaran who attended Santa Barbara High School and the University of California, Santa Barbara. Bill earned a Master of Arts degree in education at UCSB before becoming UCSB's director of admissions, a position he held for 25 years. He was appointed to serve three terms on the California Student Aid Commission by Governor Brown and has also served on the Board of Directors for Cottage Hospital and the Board of Trustees for the Santa Barbara Foundation.

HUGH BOSS

Former Partner with Kindel & Anderson, Santa Barbara Foundation Trustee

Hugh Boss is a former partner with the Los Angeles law firm Kindel & Anderson specializing in corporate and real estate law. He is a graduate of Dartmouth College and the Harvard Law School. In 1996, he relocated to Santa Barbara and became founding principal in and general counsel of American Capital Group LLC. He has served as director on the boards of the Santa Barbara Zoo, the Camino Real Foundation, and the Montecito Association. Hugh is a current member and former chair of the board of the Santa Barbara Cancer Foundation and has served as a member of the Santa Barbara Foundation's Investment Committee since 2005.