SANTA BARBARA FOUNDATION

2021 INVESTMENT COMMITTEE

FOR ALL SANTA BARBARA COUNTY COMMUNITIES

TRACY P. STOUFFER, CFA

Investment Committee Chair
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. Tracy is currently a Trustee of the Santa Barbara Foundation.

SUSAN T. RICHARDS

Investment Committee Vice Chair
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. Susan is currently a Trustee of the Santa Barbara Foundation.

ANGEL ISCOVICH, MD

Former Physician, Former CEO of Qualitas Group of Envision Healthcare, Author

Angel received his medical degree from the University of California at San Francisco and a Bachelor of Art degree in Philosophy at the University of Puget Sound. He and his wife Lisa have resided in Santa Barbara County since 1980. Since moving to the area, Angel has served as Board Chair of Direct Relief, a member of the Board of Directors of Cottage Health and Catholic Healthcare West, and as President of the St. Francis Hospital Foundation of Santa Barbara. During his tenure as a local Emergency Physician, he presided as Santa Barbara County EMS Medical Director, State of California EMS Commissioner, Assistant Clinical Professor at the Keck USC School of Medicine, and the American Heart Association National Faculty. He recently retired as CEO of the Qualitas Group of Envision Healthcare. Currently, he serves as the Board Chair of Potentia Analytics, on the Board of the World Telehealth Initiative, and as Medical Director of Montecito Fire Department. He has received awards as Physician of the Year and Distinguished Alumni for Community Service. As an author and speaker, he is able spend time with groups and individuals to help solve issues and make for a better world. Angel is currently a Trustee of the Santa Barbara Foundation.

MATT ROWE, CIMA

Financial Advisor, VP, Raymond James

Matt Rowe is a Financial Advisor at Raymond James. He has advised high net-worth families in the area of wealth management since 2000. His extensive experience in structuring portfolios and allocating capital, including alternative investments and collaboration with independent money managers, positions him to advise clients across a broad range of asset classes.

Matt takes a very active role in the local community. He currently serves on the Board of the Scholarship Foundation Santa Barbara and will be the Board Chair beginning July 1, 2021. He serves on the Board of Managers of the Santa Barbara Family YMCA and is heavily involved in the Y's Annual Campaign for Youth and Families. Matt supports other local charities, including Direct Relief International and the Sansum Diabetes Research Institute; and is a member of the Santa Barbara Natural History Museum and the Santa Barbara Zoo. Matt is also a long-time member of the American Australian Association and the St. Kilda Football Club.

Matt was born and raised in Australia. He earned a Bachelor's Degree in Accounting, a minor in Economics and a Law Degree, from Monash University. Matt was admitted to the Supreme Court of Victoria, Australia and practiced law in the area of property litigation before immigrating to the United States in 2000. Matt now holds securities, life, and health insurance licenses and has attained the designation of Certified Investment Management AnalystSM (CIMA®) after completing a course of study with The Wharton School, University of Pennsylvania. Matt is a long-standing member of the Investment Management Consultations Association (IMCA®) and a regular attendee of their New York Consultants Conference, held annually in New York City.

Outside of the office, Matt enjoys spending time with his family and friends, traveling, hiking, and playing golf. Matt has successfully completed five marathons, including three New York City Marathons. He resides in Santa Barbara with his wife Natalie and their two daughters, Kelsey and Hailey. Matt is currently a Trustee of the Santa Barbara Foundation.

Edward P. Bousa

Former Portfolio Manager, Wellington Management Company

Edward Bousa has served as a Director of Omnicell since July 2021. As a global equity investor with Wellington Management, Mr. Bousa has had extensive interactions with several thousand company management teams. More recently, Mr. Bousa was an early adopter of ESG at Wellington. He had 37 years in the investment business, with a top decile long term record identifying successful companies. He led the Quality Value team at Wellington where his team's assets under management grew from $26 billion in 2002 to over $90 billion of equity assets. Mr. Bousa was lead equity manager for the Vanguard Wellington Fund balanced fund, the oldest balance fund in the US.

Prior to joining Wellington, Mr. Bousa was a mutual fund manager at Putnam Investments from 1992-2000. He was an equity research analyst and portfolio manager at Fidelity Investments from 1983-1992. Mr. Bousa began his career as a commodity merchandiser at Louis Dreyfus Corporation from 1980-82. He is a Chartered Financial Analyst.

Mr. Bousa is a graduate of Williams College BA 1980 in Economics and Harvard Business School 1984.

EMERITUS MEMBERS

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. Tom is a former Trustee of the Santa Barbara Foundation.

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. Rob is a former Trustee of the Santa Barbara Foundation.

JENNIFER MURRAY

Financial Advisor, Morgan Stanley Smith Barney, Global Wealth Management Group

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. Jennifer is a former Trustee of the Santa Barbara Foundation.