

Profile

Erina

First Name

S

Middle Initial

Ford

Last Name

esford82@gmail.com

Email Address

2932 Eagle Estates Circle N.

Home Address

Suite or Apt

Clearwater

City

FL

State

33761

Postal Code

Home: (727) 255-3676

Primary Phone

Alternate Phone

Length of Residency - please select one. \*

☒ 6+ years

Do you own or represent a business in Clearwater?

☐ Yes ☒ No

If yes, where is the business located? Do you conduct business with the City?

Which Boards would you like to apply for?

Environmental Advisory Board: Submitted

Raymond James Financial

Employer

VP, Investment Products & Support

Job Title

Occupation - If retired, enter former occupation.

Finance

Have you served or do you serve on a board in Clearwater?

☐ Yes ☒ No

If yes, please list the name of the board.

Why do you wish to serve on this board/committee? If seeking reappointment, state why you should be reappointed.

I am passionate about the environment and protecting our resources. I am involved in Raymond James' efforts around sustainability as well and believe I can bring bring some of this experience to the table.

## What personal qualifications can you bring to this board or committee?

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I sit on several committees at Raymond James and am adept at providing constructive feedback and working with people of diverse backgrounds and viewpoints. I am an experienced leader, consensus builder, and public speaker.

## List Community Activities

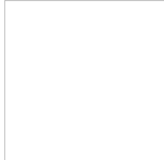
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Homeless Empowerment Program Youth Volunteer Corp., Junior Achievement of Tampa Bay, GFWC Clearwater Junior Woman's Club.

[2024 Resume\\_EF\\_.pdf](#)

Upload a Resume

Question applies to multiple boards



Please attach a copy of one of the following documents: 1) valid current Florida Driver License issued to an address within city limits, or 2) Declaration of Domicile filed with the city clerk affirming residency within city limits.

Question applies to multiple boards

## Are you related to any member of the City Council?

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☐ Yes ☒ No

Question applies to multiple boards

## If yes, please provide name and explain relation.

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N/A

Question applies to multiple boards

## Are you related to a city employee?

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☐ Yes ☒ No

Question applies to multiple boards

## If yes, please provide name and explain relation.

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N/A

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## Demographics

Some boards and commissions require membership to be racially, politically or geographically proportionate to the general public. The following information helps track our recruitment and diversity efforts. (Optional)

## Ethnicity

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☒ Caucasian/Non-Hispanic

## Gender

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☒ Female

04/08/1982

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Date of Birth

**The City of Clearwater strives to promote diversity and provide reasonable accommodations for individuals with disabilities. If you are requesting accommodation, please indicate below:**

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**By clicking on "I Agree," below, I affirm that the information above is true and correct, and that I understand and agree to the responsibilities and commitment of time associated with an appointment to a Clearwater advisory board or committee.**

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☒ I Agree

All material submitted to the City of Clearwater is subject to the public records law of the State of Florida including Chapter 119, Florida Statutes.

## ERINA S. FORD, CFA®, CAIA®

Clearwater, FL / (727) 255-3676 / [esford82@gmail.com](mailto:esford82@gmail.com)

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### SUMMARY

Dynamic leader with more than 17 years of financial industry experience. Expertise in investment analysis across a multitude of strategies and vehicles, public speaking, setting strategy, and leading diverse teams. Current national co-chair of the Raymond James Women's Inclusion Network, the firm's largest associate inclusion network focused on supporting the professional development of women at Raymond James.

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### EXPERIENCE

#### RAYMOND JAMES FINANCIAL

*VP, Investment Products Research & Support*  
*Director, Mutual Fund Research*

**St. Petersburg, FL**  
*May 2021 – Present*  
*July 2017 – May 2021*

- Oversee investment research for mutual funds, ETFs, and UCITs vehicles available at Raymond James; three product areas with combined assets under administration of more than \$500 Billion
- Lead a team of 15 professionals responsible for maintaining the firm's recommended funds lists, comprised of approximately 150 strategies with more than \$80 Billion in assets
- Manage department budget and set strategic direction for Mutual Fund & ETF Research
- Determine policies and procedures for platform approval of open-end mutual funds, ETFs, and UCITs covering domestic equity, global and international equity, fixed income, and alternative strategies
- Edit and approve written fund research, marketing reports, due diligence, and white papers
- Frequent speaker at internal and external events (i.e., national and regional meetings, conferences, committees and councils.)
- Member of the Qualified Retirement Plan Investment Committee, Institutional Fiduciary Solutions Investment Committee, Charitable Endowment Fund Investment Committee, and the firm's Sustainable Investments Advisory Council.
- Selected by the firm's Executive Committee to co-lead the Raymond James Women's Inclusion Network for 2023 – 2025

#### *Senior Research Analyst, Alternative Investments Group*

*August 2010 – July 2017*

- Acted as an integral part of a seven-person team that provided research analysis for a diverse alternative investments platform with over \$6 billion in assets under administration across more than 75 products, including hedge funds, private equity, venture capital, real estate, structured products, and alternative mutual funds
- Performed detailed qualitative and quantitative analyses on products considered for addition to the platform, including conducting performance, ratio, and risk analyses; assessing the experience of the management team; analyzing the sustainability and repeatability of the investment process; investigating the sources of investment returns; analyzing the timeliness and effectiveness of the investment theme; and assessing the firm's overall business and operational strength
- Participated in monthly meetings with Raymond James' CEO, Chairman of the Board, and other senior executives to present new alternative investments products for approval
- Prepared written financial communication, including new investment recommendation memos, ongoing due diligence reports, and quarterly industry and fund commentary
- Utilized industry contacts, hedge fund databases, and the firm's employees and financial advisors to continually source and research new managers for potential platform inclusion
- Selected by senior management to a team leading efforts to integrate an alternative suite of products with over \$5 billion in assets under administration following a strategic acquisition by Raymond James
- Created and successfully implemented a process for reviewing and vetting alternative mutual funds, including authoring strategy specific questionnaires and spearheading all of the operational, marketing, and compliance initiatives

#### *Structured Products Analyst*

*Aug. 2008 – Aug. 2010*

- Sourced new investment ideas for a product line that is responsible for half of the Alternative Investments Group's annual sales
- Communicated regularly with issuing firms to structure new offerings and obtain the most favorable terms for our clients
- Interacted daily with financial advisors as a main education and marketing contact for structured products offerings
- Managed the suitability review, trading, and execution processes for monthly sales that averaged in excess of \$10 million

**EXPERIENCE (Cont.)**

**RAYMOND JAMES FINANCIAL**

*Operations Specialist*

**St. Petersburg, FL**  
**Nov. 2006 – Aug. 2008**

- Processed investment documents and managed the movement of funds between Raymond James and various hedge funds
  - Successfully led the operational launch of numerous products on the Raymond James Alternative Investments platform
  - Created written procedures for existing operational processes covering all of the strategies and products on the platform
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**EDUCATION**

**HARDING UNIVERSITY**

**Searcy, AR**

B.B.A., International Business; *summa cum laude* (3.90 GPA)

International Students Society; *Co-founder and Activities Director*

International Business Society; *Executive Committee*

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**ADDITIONAL**

- Women's Inclusion Network National Co-Chair (2023 – 2025)
- Recognized by Citywire as one of the Most Influential Women in Due Diligence (2021-2024)
- GFWC Clearwater Junior Woman's Club: President (2012); VP (2010 and 2011); International Outreach Chair (2009 – 2011)
- Chartered Financial Analyst and member of the CFA Society of Tampa Bay
- Chartered Alternative Investments Analyst
- FINRA General Securities License (Series 7)
- Languages: English (*Full Professional Fluency*), Albanian (*Native*), Italian (*Conversational Fluency*)