
Profile

Laurie

First Name

A

Middle
Initial

Watson

Last Name

lauriewatson529@gmail.com

Email Address

2699 Meadow Wood Dr

Home Address

Suite or Apt

Clearwater

City

FL

State

33761

Postal Code

Home: (727) 686-7364

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?**

City of Clearwater Defined Contribution Plans Fiduciary Investment Committee: Submitted

Retired

Employer

retired

Job Title

Occupation - If retired, enter former occupation.

Institutional Financial Services Client Service

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.

Prior to retiring in 2021, I worked for an investment firm focused providing investment solutions to Public Pension Plans and Institutional Plan Sponsors. I have been retired nearly 5 years and would like to contribute to the city in an area that I have useful knowledge and experience.

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

My degree is in Finance, I retired after 35 years from the investment services industry specifically focused on Public Plan Sponsors and was a member of the Florida Public Pension Trustees Association (FPPTA) for more than 25 years.

List Community Activities

none currently, so I have ample time to dedicate to the committee.

[LWatson-Resume.docx](#)

Upload a Resume

Question applies to multiple boards

Are you related to any member of the City Council?

Yes No

Question applies to multiple boards

If yes, please provide name and explain relation.

none

Question applies to multiple boards

Are you related to a city employee?

Yes No

Question applies to multiple boards

If yes, please provide name and explain relation.

none

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

Caucasian/Non-Hispanic

Gender

Female

05/29/1962

Date of Birth

Laurie A Watson

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

none

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.

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.

Laurie A. Watson

RETIRED-

INVESTMENT MANAGEMENT SALES & MARKETING PROFESSIONAL

2699 Meadow Wood Drive Clearwater, FL 33761 | 727.686.7364 | lauriewatson529@gmail.com

Overview

I have been a Pinellas County resident for more than 43 years, 27 of those years have been as a city of Clearwater resident. I have more than 35 years of investment experience supporting Pension Plan Trustees in their mission to provide continued and improving pension benefits to their plan members. I would like to continue in this mission as a trustee of the plan.

Experience

Great Lakes Advisors, Tampa, FL

2000-2021

Managing Director, Sales and Marketing

In this role, I was the lead client service representative for our Police, Fire and General Employee plans. I served as a product expert to the research teams of Morgan Stanley, Merrill Lynch and SEI in addition to over 30 investment consultants.

I analyzed competing manager products to compare and contrast them to our products with respect to return and risk and the appropriate investment universe.

Raymond James Financial

1991-2000

Client Service professional - Eagle Asset Management

Lead client contact for more than 50 plan sponsors.

Education

University of South Florida

1996

Major: Finance

Former Licensing and Accreditation

relinquished upon retirement

- Series 7-General Securities Representative
- Certified Investment Management Analyst, (CIMA®) Investment Wealth Institute's Certified Investment Management Analyst® (CIMA®) certification is the highest level of investment education for client-facing advisors.
- Former member of the Florida Public Pension Trustees Association - As a member for more than 25 years, I supported the organization's annual conference and semi-annual trustee schools. I prepared and delivered investment presentations in accordance with the organization's requests.