



## **SBF INVESTMENT COMMITTEE**

### **TRACY P. STOUFFER, CFA**

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#### *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.

### **PETER C. HAGAN**

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*Chairman, EBS Bank*

Peter Hagan is a graduate of both the University of Manchester (England) and its Business School. Following a financial career spanning four continents, Peter and his wife, Christine, settled in Santa Barbara in 2014. Peter is Chairman of EBS Bank, (a Dublin, Ireland, bank). Previously he was a board member (Chair of the Risk Committee) at Allied Irish Banks, Chairman of the US Subsidiaries of Anglo Irish Bank and held senior executive roles at private equity firm Cerberus Capital Management, The Aozora Bank (Tokyo) and Merrill Lynch and Co.

Peter has been a volunteer Board and Committee Chair at the Thomas Edison State University Foundation. and a volunteer Director at the Trenton (NJ) Economic Development Corporation.

## **Kiah Jordan, CFP®, ChFC®, MSSE, CLPF**

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### *Founder Impact Family Office*

Kiah Jordan launched Impact Family Office in order to focus on the alignment of capital resources with an impact strategy. Kiah works alongside his clients to support their values and goals with the sources and uses of their wealth. He implements long-term perspectives on the impact of, not only his clients' balance sheet, but also their succession plans, wealth transfer plans, and philanthropic engagement.

Prior to starting Impact Family Office, Kiah worked for Santa Barbara Capital, a real estate investment firm, and it was during this time that Kiah completed his Certified Financial Planner™ designation and found a passion for applying a holistic planning perspective to personal finances and business operations. Additionally, Kiah is a National Certified Guardian by the Center for Guardianship Certification and a licensed Professional Fiduciary by the California Professional Fiduciaries Bureau.

Kiah graduated from Westmont College with degrees in economics and business, and also Spanish. He completed his master's degree in social entrepreneurship at the University of Southern California Marshall School of Business.

An advocate for socially conscious ventures and entrepreneurship, Kiah has dedicated much of his time to start-ups and organizations benefiting the Central Coast community. He is an alumnus of the Katherine Harvey Fellows program and on the board of Leading from Within. He is a founding board member of the Sustainable Change Alliance, serves as the Chairperson of the Santa Barbara Rescue Mission, and sits on the finance committees for the Teddy Bear Cancer Foundation and the Community Environmental Council. Additionally, he was featured in the 2015 Pacific Coast Business Times 40 Under 40 and has served as an adjunct professor in Westmont College's program for social entrepreneurship.

Outside of the office, Kiah enjoys outdoor adventures with his wife and four children and plays soccer in a local recreation league. Kiah is currently a Trustee of the Santa Barbara Foundation.

## **MICHAEL E. PFAU**

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### *Founding Partner of Reicker, Pfau Pyle & McRoy LLP*

Born and raised in New York, Michael "Mike" E. Pfau earned his Bachelor of Arts degree, summa cum laude, from the University of Cincinnati. He furthered his higher education career by receiving his Juris Doctorate from Boston College Law School and Master of Law from Georgetown University Center. After law school, Mike worked in the Army's Government Appellate Division in Falls Church, Virginia, as an appellate lawyer. In 1996, Pfau became the founding partner of the Santa Barbara-based law firm Reicker, Pfau, Pyle & McRoy LLP. Mike is deeply involved in community work, having served on the boards of Santa Barbara Angel Alliance, South Coast Business and Technology Awards Dinner, UCSB Economic Forecast Project, Santa Barbara Region Chamber of Commerce, Goleta Boys & Girls Club, United Boys and Girls Club, Santa Barbara Public Education Fund, Direct Relief International, among several

other notable causes. Mike and his wife of 46 years, Aleisa Setzer Pfau, continue to nurture the central coast with their volunteer efforts and have instilled that in their three children and two grandchildren. When Mike isn't volunteering, you can find him participating in road biking events in various locations in the United States and Europe or traveling with Aleisa. Mike is currently a Trustee of the Santa Barbara Foundation.

## **MATT ROWE, CIMA**

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*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 is currently Board Chair of the Santa Barbara Foundation and was previously Chair of the Scholarship Foundation of Santa Barbara. 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 Analyst<sup>SM</sup> (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.

## **Jim Selbert**

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*Co-Founder of Accufy and Las Cumbres Ranch*

Jim Selbert holds a Bachelor of Arts degree in Economics from the University of Cincinnati and a Master of Science in Finance from the MIT Sloan School of Management.

After receiving his Master's Jim moved to California and worked as a financial analyst at Ford Motor Company and Litton Industries until 1971 when he co-founded Accufy Analytics LLC, based in Santa Barbara, California. Since its founding in 1971, Accufy's software has facilitated financing over \$1 trillion in assets, providing innovative tools and expertise to develop optimal financial solutions.

In addition to his work at Accufy, Jim owns and manages along with his wife, Patricia, and son, Stefan, Las Cumbres Ranch, a thousand-acre cattle ranch in Los Alamos, California. The ranch employs holistic practices to enhance soil fertility, biodiversity, and carbon sequestration. An active community member, Jim previously served on the board of Direct Relief for 19 years, contributing to its mission to improve health and provide essential medical resources to underserved populations around the world. Along with joining the Santa Barbara Foundation's board, Jim is also taking on a new role as a board member of The Land Trust for Santa Barbara County in January 2025. Jim has lived in Santa Barbara County since 1979 and in his free time, he enjoys hiking the county's trails with his Great Danes Leo and Lilly.

## **EMERITUS MEMBERS**

### **JENNIFER MURRAY, CFP®**

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*Senior Vice President, Financial Advisor, The Murray Group at Morgan Stanley*

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.

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## **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. Susan is a former Trustee of the Santa Barbara Foundation.

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## **ROBERT L. SKINNER**

*Chief Executive Officer and General Counsel, The Towbes Group*

Since joining the Towbes Group in 1997, Robert Skinner has served in a number of key leadership roles. He currently oversees all aspects of the company's business as CEO. During his tenure, the Towbes Group successfully closed one of the largest leasing transactions in Santa Barbara County history. He also is Chief Operating Officer and General Counsel of the Towbes Group-affiliate Montecito Bank & Trust.

In addition to his real estate and banking responsibilities, he is one of the founders and managing principals of Towbes Capital Partners, the real estate investment division of the Towbes Group. He is the chief executive officer of Agility Capital, a venture-debt fund he co-founded in 1999. Along with Michael Towbes, he formed and is managing partner of Twenty One East Victoria Investments, a firm focused on opportunities created by California's central coast technology industry.

Prior to joining the Towbes Group, Mr. Skinner was an attorney with the international law firm of White & Case specializing in real estate transaction and bankruptcy work in the Los Angeles and New York offices. His legal expertise encompasses complex business litigation and construction and real estate law.

As a community leader, Mr. Skinner has served on the Boards of Directors of Montecito Bank & Trust, the Towbes Foundation, Barrister Executive Suites, the Santa Barbara Foundation, Camerata Pacifica and the development committee for the Santa Barbara Zoo.

Mr. Skinner is a graduate of the University of Southern California with a Bachelor of Science in Business Administration and a Juris Doctorate. Rob is a former Trustee of the Santa Barbara Foundation.