

## ABOUT THE CURRENT FEOFFEEES:

**Patricia Beckwith:** Patti has been with Raymond James for over three decades. She became a CERTIFIED FINANCIAL PLANNER™ in 1994, an Accredited Estate Planner™ in 2016, and a Retirement Income Certified Professional™ in 2018. Patti also holds several securities licenses including her Series 7, 63, 65, 9 and 10.

Patti helps her clients with all aspects of financial planning, specifically focusing on planning for retirement. Using a holistic approach, Patti encourages clients to prioritize their goals, organize and understand their current financial situation and educates them on how to take control of their financial future.

Patti is very active in the community, having served in leadership positions for the Beverly and Danvers Chapters of BNI™, Essex County Estate Planning Council and Girl Scouts of Spar and Spindle Council. She is currently serving on the Board of Directors of the North Shore Chamber of Commerce, as well as Grateful Friends, a non-profit organization that provides support to adults living with cancer or going through cancer treatment.

Patti lives in Ipswich with her husband, Rene and has a 27 year old daughter, Diana. Patti enjoys cooking, reading, museums and gardening in her spare time.

**Mark Evans:** Mark is a Partner at Cambridge Associates, and a member of the firm's Endowment & Foundation practice. He works with non-profit entities to set their investment strategy, define policies and build investment portfolios. Mark has been with CA for 15 years, and prior to that worked at Bank of Boston for 17 years in various roles based in Boston, San Francisco and London. Mark and his wife Deb have lived in Ipswich for 20 years, and raised their three children (Emily, Ben and Grace) in town. Mark is a big believer in the opportunities that Feoffees grants can provide, as his youngest daughter was the beneficiary of a grant when a freshman in high school, and that experience set her on the course of study she is pursuing in college

**Richard Fates:** Dick received his BA from Yale and then spent 7 years in the Navy as an F-4 pilot. In 1975 Dick joined Bank of Boston. During his 25-year stint with the bank he was a lender, ran the Merchant bank in London and finished as Regional President responsible for Worcester County. During his banking career, Dick was Chairman of the Finance Committee for the town of Hamilton and served on numerous non-profit boards. In 2001 Dick earned his CFP and for 15 years was a Financial Planner helping families organize and improve their financial affairs. Dick has retired but serves on the Financial Advisory Board of IBYC and is Chairman of the Trust Fund Commission for the Town of Ipswich.

**Nat Pulsifer:** Nat moved to Ipswich in 1970 from NYC. He opened his investment and trust office in the Odd Fellow's Building in 1973 and soon became involved in history and Town affairs. He is a trustee of the Coburn Charitable Society and past president of the Ipswich Historical Society. In 2008-9 he organized the Town's 375th Anniversary and has been active in the Ipswich Rotary Club, the Trustees of Reservations, the Essex National Heritage Commission, Greenbelt and is a member of First Church. He and his wife Holly have two grown children, four grandchildren and live on Waldingfield Road. In his spare time he splits firewood and sings in several area choral groups.

**Ellen Rose:** Ellen is the owner and founder of the firm Ellen Rose, CPA, CFP. The company specializes in accounting, tax services and financial planning. Ellen assists clients of various sizes in a wide range of industries. The business has been located in downtown Ipswich for 27 years. Ellen is also a trustee of the Institution for Savings bank. She serves as Chairman of the Audit Committee and is a member of the Long Range Planning Committee. Ellen is also a member of the 2 Depot Square Charitable Foundation. Ellen received a BS in Accounting from Boston College, an MS in Taxation from Bentley College and a CFP Professional Education Certificate from Merrimack College. Ellen grew up in Ipswich and currently lives here with her husband, Joe and their two children, Andrew and Jessica. Ellen previously served on the Ipswich Finance Committee and has been involved with the youth religious education and sports programs for many years.

**Larry Seidler:** Larry and his wife, Marilyn, have lived in Ipswich for over 50 years. Both their children graduated from Ipswich public schools. Larry served on the Ipswich School Committee for 15 years, from 1981 to 1996, with 3 years as its chair. From 1996 to 2004 Larry chaired the committee that oversaw the design and construction of the high school/middle school. From 2008 to 2014 Larry served on the Finance Committee, serving as its vice-chair. Larry organized the annual Finance Committee report and started a Long Range Planning subcommittee. Larry graduated from Northeastern University with BS and MS degrees in engineering and worked for GE in Lynn and Raytheon in various senior management positions

**Walter Zagrobski:** Walter and his wife Vee, have lived in Ipswich since 1976, raising two daughters here. Vee, an RN, may be known to anyone who visited Cable Emergency during the many years it served the residents of Ipswich so well.

Walter's entire career of over 4 decades has been devoted to the investment management and trust business. While at State Street, Keystone and now Appleton Partners, he has provided hands on investment and trust oversight of portfolios for families and charitable organizations across the country. His responsibilities have involved investment research, portfolio management and direct interaction with clients, consultants, brokers and other industry professionals. Additionally, he has been involved as a volunteer for various charitable organizations, including over 20 years as Chairman of Easter Seals Investment Committee and most recently as a member of the investment Committee for Wellforce (Tufts Medical, Melrose-Wakefield, Lowell General etc ). In these positions he is charged with the responsibility of selecting, monitoring, dismissing outside managers and running investment advisor searches.

Walter graduated magna cum laude with a BS in Business Administration from UNH before going on to Babson College where he earned an MBA with a concentration in Finance. He also received Trust Banking degrees from Williams College and Northwestern University and is a longstanding member of the Boston Security Analysts Society.

**PAST FEOFFEES:**

Tracy Filosa (2012-2015)  
Peter Twining (2012-2014)  
George Markos  
Thomas Reardon  
Greg Stevens  
Seth Ward  
Joe Tragert