

ABOUT THE CURRENT FEOFFFEES:

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.

GEORGE MARKOS: George received his BA from Rutgers University, JD from Suffolk Law School and LLM from Boston University School of Law. Prior to becoming a principal at Yell-O-Glow Corporation, George was Senior Legal Counsel and Assistant Secretary at Norton Company, Senior Associate Attorney at Csapler & Bok, and Registered Representative of Edwards and Hanly Investments. He has served as a committee chair and Director of Boston Acoustics, as a Director of Community Credit Union, Past Chair of the Ipswich Finance Committee, Past Chair of the Demographic Study Committee for Ipswich Public Schools and on various charity boards. He and his wife, Jill, live in Ipswich and are proud parents of three children, Ashley, Katerina and John, all five family members are products of Ipswich public schools.

THOMAS REARDON: Tom is President of Prospect Medical Holdings - East. Tom has served as CEO of several multi-hospital systems, a hospital turnaround firm and a distressed bond fund investor. Previously, he was a senior partner, Executive Committee member and co-chair of the Health Law Department of Mintz Levin in Boston. Tom has been a member of the faculty at the Harvard School of Public Health; a long time columnist for "Hospital News;" has authored two books and over 200 articles on healthcare; and has served on numerous Boards, including Harvard Medical Center, Harvard Risk Management/CRICO and Chairman of the Board of the Massachusetts Eye & Ear Infirmary and MetroSouth Medical Center in Chicago. Tom received his BA, *cum laude*, from Alfred University and his JD from Harvard Law School. He and his wife Anne have lived in Ipswich since 1988 and their 4 children and 6 grandchildren live in California, Florida and Tennessee.

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.

GREG STEVENS:

Greg graduated from the University of New Hampshire with a BA in Economics and Political Science. Greg is a Registered Investment Advisor and Chief Compliance Officer at Cabot Money Management, a wealth management firm headquartered in Salem, Massachusetts. He also holds the professional designation of Certified Financial Planner (CPF). As an investment advisor, Greg works with high net worth individuals, endowments and non-profit organizations to help them construct asset allocation and financial plans suited to their individual needs. Greg was born and raised in Ipswich and has 4 kids currently in the school system. He is very involved in the youth sports programs in Ipswich and as a volunteer coach for both the youth football and soccer programs.

JOE TRAGERT: Joe is the Senior Director of Product Management for EBSCO. He is responsible for the development of new products and services into the corporate and government markets. Prior to joining EBSCO, Joe worked for KPMG Peat Marwick, privatizing assets in the Former Soviet Union and Eastern Europe. Joe holds an MBA from Wharton School of the University of Pennsylvania, an MA in Russian Studies from Georgetown University, and a BA, *cum laude*, in Economics and Philosophy from Boston College. He is an Adjunct Lecturer at the Van Loan School of Graduate Studies at Endicott College. Joe and his wife Bernadine have lived in Ipswich since 1997 and are parents of Joe (Jr).

SETH WARD: Seth is a Managing Director at Brown Brothers Harriman (BBH) and currently serves as a Team Leader and Senior Relationship Manager in the firm's Wealth Management business. Prior to BBH, he spent ten years at State Street Global Advisors in client services and sales, crafting investment programs for institutional and individual investors. Mr. Ward received his BA from Yale University and his MBA from the Harvard Graduate School of Business Administration. He and his wife Penny have lived in Ipswich since 1997 and are parents of Charlotte, Owen and Sophie.

PAST FEOFFEES:

Tracy Filosa (2012-2015)

Peter Twining (2012-2014)