



ALASKA PERMANENT
FUND CORPORATION

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STATE OF ALASKA
ALASKA PERMANENT FUND CORPORATION
INVESTMENT ADVISORY GROUP APPLICATION
APFC- FY25-010

Please provide the following information in the space provided or attach additional sheets as necessary.

Name: _____

Home Address: _____

Home Phone: _____ Cell Phone: _____

Home Email: _____

Employer: _____

Position: _____

Business Address: _____

Business Phone: _____ Business Email: _____

1. Please list all colleges, universities and graduate schools attended, including dates attended, degrees awarded and addresses:

2. Please list all professional licenses, certificates, registrations, and/or professional accreditation currently held in state, federal and national associations (include dates obtained):

Attachment 1 – Investment Advisory Group Application

3. Have you ever had any license or certificate suspended or revoked? If so, please explain.
4. Please list all academic affiliations.
5. With respect to any public pension benefit funds, foundations, or endowments, please list all previous and current advisory, management or fiduciary roles to boards, including dates. Please include any current board seats, commission and/or directorship positions held.
6. Discuss responsibilities you assumed in the roles listed in #5 above.
7. Please list up to three publications that you have authored on matters relevant to this application. Also, please note sites so we may access your publications.
8. Please briefly describe the nature of your current employment and your responsibilities.

Attachment 1 – Investment Advisory Group Application

9. Please briefly describe your knowledge of and/or involvement in, or historical perspective of the Alaska Permanent Fund Corporation.
10. What is the governance structure for the funds under your advisement/management? Please identify the fiduciaries and who has the responsibility for investment policy and asset allocation.
11. Have you ever been party to or subject to an investigation for any reasons relating to financial or fiduciary conduct by a government agency or professional organization? If yes, please explain.
12. Have you ever been named as a defendant in a lawsuit? If yes, please explain.
13. Have you ever been terminated or asked to resign from any position in the past 15 years? If yes, please explain.
14. As an attachment, please provide as references the names, addresses and telephone numbers of five people who can attest to your professional qualifications. Two of the five references must be from people who have been members of a board as a trustee or to whom you have provided services.

15. Please describe any employment related or other potential limitations on your availability to participate in IAG business (either limits on your time or limits due to conflicts of interest).

16. At this time, do you anticipate any potential areas of conflict?

17. To assist us with future recruitment efforts, please let us know how you learned about this position.

Applicant Signature:_____

Date:_____

Note: As an IAG member, you will be required to file disclosure statements informing the Board of other current board service, companies in which you hold an interest, or other potential conflicts of interest.

All applications and other material submitted become the property of the State of Alaska and may be returned only at the state's option. AS 40.25.110 requires public records to be open to reasonable inspection. All application information will be held in confidence during the evaluation process and prior to the time a Notice of Intent to Award is issued. Thereafter, proposals will become public information.