

**Agency Report of:
Ceremonial Role Events and Ticket/Pass Distributions**

A Public Document

1. Agency Name		Date Stamp	California Form 802
CSU Channel Islands			For Official Use Only
Division, Department, or Region (if applicable)			
University Advancement			
Designated Agency Contact (Name, Title)		<input type="checkbox"/> Amendment (Must Provide Explanation in Part 3.)	
Richard LeRoy Senior Director of University Development			
Area Code/Phone Number	E-mail	Date of Original Filing: _____ (month, day, year)	
805-437-1662	richard.leroy@csuci.edu		

2. Function or Event Information

Does the agency have a ticket policy? Yes No Face Value of Each Ticket/Pass \$ 200.00

Event Description: UCSB Economic Forecast Proejct Date(s) 05 / 16 / 19
Provide Title/ Explanation

Ticket(s)/Pass(es) provided by agency? Yes No If no: Montecito Bank & Trust
Name of Source

Was ticket distribution made at the behest of agency official? Yes No If yes: lpach, Nichole
Official's Name (Last, First)





3. Recipients

• Use Section A to identify the agency's department or unit. • Use Section B to identify an individual. • Use Section C to identify an outside organization.

A. Name of Agency, Department or Unit	Number of Ticket(s)/ Passes	Describe the public purpose made pursuant to the agency's policy
University Advancement	2	Strengthening alumni and private support for the CSU.
B. Name of Individual (Last, First)	Number of Ticket(s)/ Passes	Identify one of the following:
		Ceremonial Role <input type="checkbox"/> Other <input type="checkbox"/> Income <input type="checkbox"/> <i>If checking "Ceremonial Role" or "Other" describe below:</i>
		Ceremonial Role <input type="checkbox"/> Other <input type="checkbox"/> Income <input type="checkbox"/> <i>If checking "Ceremonial Role" or "Other" describe below:</i>
C. Name of Outside Organization (include address and description)	Number of Ticket(s)/ Passes	Describe the public purpose made pursuant to the agency's policy

4. Verification

I have read and understand FPPC Regulations 18944.1 and 18942. I have verified that the distribution set forth above, is in accordance with the requirements.

Signature of Agency Head or Designee Print Name Title (month, day, year)

Comment: _____



ECONOMIC FORECAST PROJECT

UNIVERSITY OF CALIFORNIA, SANTA BARBARA

MAY 16, 2019
The Granada Theatre

1214 State St
Santa Barbara, CA 93101

Check-in/Breakfast: 7:30-8:30 am
Presentations: 8:30-11:15 am

TICKETS

arts & lectures

\$200 (includes copy of annual publication and continental breakfast). Available at artsandlectures.sa.ucsb.edu or call the A&L box office at 805.893.3535.

For event information, call 805.893.5148.

PANEL DISCUSSION

Presentations will be followed by a panel moderated by Peter Rupert.

FOUNDING SPONSOR



PLATINUM SPONSOR



The UCSB Economic Forecast Project was established in 1981 by the Department of Economics at UCSB to provide the community with information on economic, demographic, and regional business trends in the Santa Barbara, Ventura, and San Luis Obispo county areas.

[HTTP://WWW.EFP.UCSB.EDU](http://www.efp.ucsb.edu)

2019 SOUTH COUNTY ECONOMIC SUMMIT

FINANCING THE FUTURE



*Speaking about
interest rates,
monetary policy,
and the economy*

NEEL KASHKARI

**PRESIDENT, FEDERAL RESERVE BANK
OF MINNEAPOLIS**

Neel Kashkari is President & CEO of the Minneapolis Fed, and serves on the FOMC. He earned his bachelor's and master's degrees in mechanical engineering from University of Illinois, and went on to become an aerospace engineer, developing technology for NASA missions. He later turned to finance and public policy, earning his MBA from the Wharton School, and joining Goldman Sachs. He also served in several senior positions at the US Treasury Department, including overseeing TARP during the financial crisis.



*Speaking about
growth cycles,
financial innovation,
and cash-intensive
businesses*

KATHY MOE

**REGIONAL DIRECTOR,
FDIC SAN FRANCISCO**

Kathy Moe is Director of the FDIC's San Francisco Region, responsible for oversight of financial institutions in the Western US, Guam, and Micronesia. Prior to this, she served as FDIC Deputy Regional Director for Risk Management. In her 32-year FDIC career, she has led numerous high-profile projects, including developing training based on lessons from the financial crisis. Kathy has a BS in finance from University of Nebraska, and is a graduate of the Graduate School of Banking at the University of Colorado.



*Speaking about
cannabis and the
banking sector*

MICHAEL COX

**BOARD MEMBER, FACIAM HOLDINGS;
CFO, EL CAPITAN ADVISORS**

Michael Cox is on the board of Faciam Holdings, the entity seeking to acquire Summit Bank. He is also CFO/principal at El Capitan Advisors in Santa Barbara. Prior to this, Michael was a partner at White Bison Capital, and a vice president at The Capital Group Companies. He has also held positions at Thomas H. Lee Partners, Goldman Sachs, and the Washington DC Fed. Michael received his BS in economics from the University of Alabama, and MBA from Stanford.



PETER RUPERT

**EXECUTIVE DIRECTOR
UCSB ECONOMIC FORECAST PROJECT**

Peter is the Executive Director of the UCSB Economic Forecast and Associate Director of the UCSB Laboratory for Aggregate Economics and Finance with Nobel Laureate Finn Kydland. He served as Senior Research Advisor for the Federal Reserve Bank of Cleveland for 13 years.

Levi, Julia

From: Schneider, Helene
Sent: Wednesday, April 10, 2019 12:56 PM
To: Ipach, Nichole
Cc: Levi, Julia; LeRoy, Richard; Chairez, Nikki
Subject: Re: UCSB Economic Forecast Project | Annual Economic Summit - May 16

Got it. Okay.

On Apr 10, 2019, at 12:46 PM, Ipach, Nichole <nichole.ipach@csuci.edu> wrote:

Correct. Thanks.

Nichole Ipach
Vice President for University Advancement
CSU Channel Islands
One University Drive
Camarillo, CA 93012

805-437-8893 (office)
805-758-1230 (cell)

<image001.png>

From: Levi, Julia
Sent: Wednesday, April 10, 2019 12:46 PM
To: Ipach, Nichole <nichole.ipach@csuci.edu>
Cc: LeRoy, Richard <richard.leroy@csuci.edu>; Schneider, Helene <helene.schneider@csuci.edu>; Chairez, Nikki <nikki.chairez@csuci.edu>
Subject: RE: UCSB Economic Forecast Project | Annual Economic Summit - May 16

Absolutely.

So to confirm, they offered 2 tickets to the event? One for Nichole and one for Helene?

Thanks,

Julia Levi, M.A.T.L.
Donor Relations and Stewardship Assistant

California State University Channel Islands
One University Drive / Camarillo, CA 93012
805-437-3683
<image002.png>

From: Ipach, Nichole
Sent: Wednesday, April 10, 2019 11:54 AM
To: Levi, Julia <julia.levi@csuci.edu>
Cc: LeRoy, Richard <richard.leroy@csuci.edu>; Schneider, Helene <helene.schneider@csuci.edu>; Chairez, Nikki

<nikki.chairez@csuci.edu>

Subject: FW: UCSB Economic Forecast Project | Annual Economic Summit - May 16

Hi J,

Like Helene, I was invited to this. Can you please run this through our process?

Nichole Ipach
Vice President for University Advancement
CSU Channel Islands
One University Drive
Camarillo, CA 93012

805-437-8893 (office)
805-758-1230 (cell)

<image001.png>

From: Sara Stokley [mailto:sstokley@montecito.bank]
Sent: Wednesday, April 10, 2019 10:40 AM
To: Ipach, Nichole <nichole.ipach@csuci.edu>
Subject: UCSB Economic Forecast Project | Annual Economic Summit - May 16

CAUTION: This email originated from outside of CSUCI. Do not click links or open attachments unless you validate the sender and know the content is safe. Please forward this email to infosec@csuci.edu if you believe this email is suspicious. For more information on how to detect Phishing scams, please visit <https://www.csuci.edu/its/security/phishing.htm>

Hi Nichole,

Montecito Bank & Trust is a proud sponsor of the Annual Economic Summit hosted by the UCSB Economic Forecast Project. On behalf of George and the Bank, we would like to extend an invitation to you to join him on Thursday, May 16th at the Granada Theatre. Please see the details below. We hope that you can join us!

Please let me know if you are available to attend and we will hold a seat for you.

<image003.png>

Thanks,
Sara

Sara Stokley
Executive Assistant
Montecito Bank & Trust
1010 State Street
O: 805-564-7389 (Ext. 7389) - M:
sstokley@montecito.bank

Behind every great community is a great bank.

16 Best Bank Awards in last 6 years

2017 Bank of the Year – WBA

2018 Best Mortgage Company - SB Independent

Best Bank to Work for in California – American Banker

Security Notice: When emailing confidential information, please use our secure email system found under Contact Us/Secure Messaging on our website.

Confidentiality Notice: The documents accompanying this e-mail transmission are legally protected and intended only for the use of the individual or entity named above. If you are not the intended recipient, you are hereby notified that any disclosure, copying, distribution or the taking of any action in reliance on the contents of this e-mail information is strictly prohibited. If you have received this transmission in error, please immediately notify us by return e-mail and destroy the original transmission and its attachments without reading or saving it in any manner. Thank you.