

CITY OF PEMBROKE PINES
ADVISORY BOARD AND COMMITTEE APPLICATION FORM

*Please return the **signed and completed application form and a recent resume*** to: City of Pembroke Pines, City Clerk's Office, 601 City Center Way, Pembroke Pines, Florida 33025.*

***NOTE: YOUR RESUME MUST ACCOMPANY THIS APPLICATION IN ORDER FOR THE APPLICATION TO BE CONSIDERED.**

Please type or use dark ink to complete this form.

Applicant Name _____

Race* _____ National Origin* _____

Occupation _____

Street Address _____

Subdivision _____

Home Telephone _____ Business Telephone _____

E-mail Address _____

Length of Residence in Pembroke Pines
(if applicable) _____
Years Months

Length of Time as Business Person in
Pembroke Pines (if applicable) _____
Years Months

Are you a registered voter? _____ Commission District No. _____ Precinct No. _____

Do you have a criminal record? _____ If yes, please explain. _____

Have you ever been convicted of a felony? _____ If yes, please explain. _____

Do you have any criminal charges pending? _____ If yes, please explain. _____

Do you have any relatives employed by the City? _____ If yes, please state name(s): _____

Are you aware of any potential conflict of interest that may arise from your serving on this/these board(s)? _____ If yes, please explain. _____

Does your business, or your employer have any contractual relationship with, or do any business with the City?_____If yes, please explain.

Do you have monies owed to the City that are delinquent?_____If yes, please explain.

Do you have any pending code violations relating to property owned by you in the City?_____If yes, please explain._____

Do you have any violations relating to other City codes?_____If yes, please list:_____

*The responses to these items is optional. The City is interested in providing for cultural diversity on its Advisory Boards and Committees, and seeks this information solely in order for the City to further its goal to provide for diversity on its Advisory Boards and Committees.

Which board or committees are of interest to you? Please indicate up to three preferences by ranking. Please denote your first choice with a “1,” etc. Please place a number adjacent to any board or committee for which you wish to be considered. If you do not place a number next to a board or committee, the City Commission will not be able to consider you for that board or committee.

_____Arts & Culture Advisory Board

_____Affordable Housing¹

_____Board of Adjustment

_____Charter High School Advisory Board²

_____Economic Development Board

_____Education Advisory Board

_____Environmental Advisory Board

_____Citizens Committee/Hurricane Prep
(Ad Hoc)

_____Planning & Zoning Board

_____Police and Fire Pension Fund Board

_____Diversity and Heritage Advisory Board

_____Social Media Committee (Ad Hoc)

_____Charter Review Board

_____Public Art Committee (PAC) New

_____Budget Committee (A. Castillo)

_____Charter Review Board³

_____Citizen’s Budget Advisory Board

¹You must complete the "Supplement to Application for Affordable Housing Committee."

²Representative of Educational or Business sector of the Community

³This Board is convened once every five years.

Please provide a brief statement outlining why you wish to serve on the board(s) you have indicated above.

-Given my professional & personal interests in finance & long-range planning, this type of retirement board seems particularly of interest.

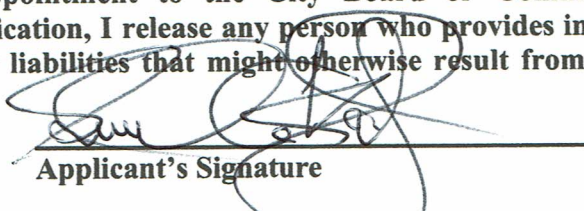
-Having served on city & corporate retirement plan boards as a senior trust officer for the Northern Trust Co., I'm certainly adept in the ongoing necessity of monthly meetings, maintenance of the Plans, and monitoring of investment managers, and keeping partici

-This type of active participation in this board will also allow me to keep up to date with ongoing investment & planning needs for individuals in our community.

-As my current professional role includes big-picture financial planning & long-range protection vehicles, this type of Board representation would be a great way to add value to our community, and continue to stay up to date in this type of retirement planning.

-Would look forward to working with city professionals, council members and Police & Fire representatives.

I hereby certify that all statements made in this application are true and complete. Permission is granted to the City of Pembroke Pines to investigate and verify criminal and credit history and any information provided on this and successive documents completed for purposes of my appointment to the City Board or Committee. In return for consideration of my application, I release any person who provides information pertaining to me from all claims or liabilities that might otherwise result from such information or opinions.


Applicant's Signature

08/11/2025

Date

Applications for board and committee vacancies are accepted throughout the year. For additional information, please call the City Clerk's Office at (954) 450-1050.

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Samuel A. Katz

Financial Services Executive

Professional/Personal Bio

Knowledgeable, detail-oriented, and forward-thinking Planner are just a few words most often used to describe Sam Katz.

With over three decades of experience in the fast-paced trust and banking industry, Sam has established himself as an innovative financial professional. He is currently a Financial Services Executive with Coastal Wealth, a MassMutual firm. In his current role with Coastal, Sam has consistently found success through his effective communication skills and the unique ability to navigate the details. He is skilled in client planning needs, while leaving a legacy for future generations through insurance and financial strategies. He has earned the trust & admiration of his clients and peers alike.

After personally being involved in a long-term care crisis with family, Sam learned the value of protecting oneself and loved ones with whole life insurance. Additionally, this asset will also have access to Tax-Free \$\$'s for Long-Term Care needs, and/or for use later in life.

Sam is also financially licensed and skilled in both Fixed & Variable Annuity Planning to include Income for Life Solutions & in some cases, having a Long-Term Care Protection element as well.

Sam enjoys regular Peloton bike rides, having been a competitive bicycle rider for many years. He regularly volunteers with Aventura Turnberry Jewish Center in various leadership roles with the Men's Club & the Temple Board of Advisors. Sam lives in the Aventura area with his wife, Meryll, having raised two grown daughters that each work for Royal Caribbean Cruise Lines. As Sam often jokes with friends & colleagues, "now his daughters take them on trips".

Professional Experience

Financial Services Executive

Coastal Wealth, a MassMutual firm · Jan 2021 - Present · South Florida

Sam continues to use his financial knowledge & background in marketing Tax-Free Long-Term Care Protection, including Life Insurance Benefits, Annuities, Income Protections Strategies, etc.

Aflac Benefits Coordinator

Aflac · Jan 2020 - Dec 2023 · 3 yrs, 11 Mo. South Florida

Senior Trust Officer of South Florida

Fifth Third Bank March 2015 - Nov 2019 · 4 yrs 10 mo Miami/Fort Lauderdale/Palm Beach Area

As Senior Trust Officer within the Private Bank, I have overseen significant wealth management relationships as part of an experienced, well-qualified team. With a long-standing history as a fiduciary with conservative financial institutions, I have continued to contribute through far-reaching capabilities and resourceful relationship manager skill set within the trust division. As Senior Trust Officer within the Private Bank, I have overseen significant wealth management relationships as part of an experienced, well-qualified team. With a long-standing history as a fiduciary with conservative financial institutions, I have continued to contribute through far-reaching capabilities and resourceful relationship manager skill set within the trust division.

Senior Investment/Portfolio Specialist

Raymond James Nov 2013 - Feb 2015 · 1 yr 4 mo., South Florida

Sam continued his role as a trust and fiduciary relationship manager utilizing all appropriate FINRA Licenses working with a team of experienced and strategic Wealth Managers to high-net-worth individuals across South Florida. Sam continued his role as a trust and fiduciary relationship manager utilizing all appropriate Finra Licenses working with a team of experienced and strategic Wealth Managers to high-net-worth individuals across South Florida.

Senior Trust Officer and Relationship Manager

Northern Trust, April 1990 through December 2013 · 23 yrs 7 mo. Miami-Fort Lauderdale Area

As a senior personal trust officer with Northern Trust Company for more than twenty years, I managed significant wealth and trust relationships. I was then promoted to Director of the institutional world overseeing all Foundation, Endowment and Retirement Plan relationships.

Education:

Florida International University

Master's Degree, Finance 1985 -1986

University of Florida

Bachelor of Business Administration (B.B.A.), Finance and Accountin 1981 - 1985