

# PROXY PARENT FOUNDATION

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## *Our Volunteers*

### **Thomas D. Stevens, Los Angeles Capital Management**



Proxy Parent Foundation Board Member Tom Stevens is an Investment Manager by trade. But, he is a man that wears many hats. Long time residents of Westlake Village, he and his wife Barbara have raised three children and been active in many community organizations, especially youth sports. He has been a member of the Board of Governors for Special Olympics Southern California for 10 years and has primary responsibility for one of the key fund raising events for that organization. Through a good friend who has a son with mental illness, he was introduced to Proxy Parent Foundation. Once he met Carla Jacobs, Member at Large and past Treasurer and Executive Director, he became committed to working with Proxy Parent Foundation and setting up the structure for the PLAN of California Master Pooled Trust.

"Carla has a knack for drawing in people," Tom said, "Proxy Parent Foundation has an incredible potential to serve the needs of a large group of disabled individuals."

Tom is Chairman and CEO of Los Angeles Capital Management, an institutional investment management firm with over \$6 billion in assets under management. The firm works with some of the largest pension funds in the world and, as its Chairman, Tom is responsible for setting the firm's strategic goals and developing the firm's portfolio management team. He serves as the primary contact for the firm's largest relationships which are located across the US and in Europe.

In addition to his professional activities, he is also very active in several startup company ventures. One of his passions is helping to nurture young businesses & nonprofits into successful enterprises.

"Tom is one of the most decent people I have ever met," said Carla, "He keeps on giving and giving of himself and his skills. Serving on our Board of Directors and the Business Committee, Tom has been instrumental in helping to recruit individuals who have the energy and expertise that are needed to help our families and achieve the goals of the organization."

### **Steve Hawkins, PainePR**

One of the individuals that Tom Stevens has recruited to work on Proxy Parent Foundation's Business Committee is his longtime friend, Steve Hawkins.

Steve is a managing partner of PainePR and provides strategic counsel to a broad range of clients in industries such as health care, biotechnology, banking and financial services, real estate, retail, consumer marketing, technology, automotive and nonprofit. Steve has a B.A. in political science and a master's degree in international management with emphasis on international business, economics, and Spanish.

Steve is helping Proxy Parent Foundation develop a solid business plan from which we articulate our core mission: providing "family-like" personal support



services to people with mental illness and acting as trustee of the PLAN of California Master Pooled Trust.

A former journalist, Steve was West Coast News/Los Angeles Bureau Chief of *U.S. News and World Report* and a correspondent for McGraw-Hill World News.

### **Thomas Beltran, Esq.**

Volunteering with Proxy Parent Foundation, Tom Beltran is the attorney who drafted the PLAN of California Master Pooled Trust. Due to his extensive experience working within the disability community, Tom recognized how valuable a state-wide pooled trust would be for people who are disabled so that their assets could be used to enhance their quality of life while not impacting their eligibility for public benefits.

Tom's areas of legal practice include disability-related estate planning, balancing the special needs of parent and child, Medicaid, social security, Medi-Care Set Aside issues, probate and federal rights litigation. In the mid-1980s, Tom was part of a Congressional demonstration project, leading to codification of the SSI work incentives. More recently, he was part of a task force to revise California's special needs trust law and prepared the initial draft of the amendments.

Tom is also a master guitar builder, which served us well recently when Sergio's (fictitious name of a beneficiary) Special Needs Trust bought Sergio a workbench. Bruce, his Proxy Parent Foundation Personal Support Specialist, and Sergio tried to put it together to no avail. The Board and Care maintenance man then had a go at it: still no assembled workbench. Tom visited Sergio on the weekend and made short work of it. Now that the workbench is assembled, Sergio can pursue his hobby.

Tom is the brother of two siblings with disabilities.

## ***Our Advisors***

### **The Summa Group**

PLAN of California engages Oppenheimer & Co. Inc.'s, The Summa Group to manage the investment and reinvestment of the assets of the PLAN of California Master Pooled Trust. The firm has been providing financial services for over 120 years.

Tyler Dritz acts as Advisor to the Proxy Parent Foundation Board of Directors, through its Business Committee, to provide a continuous investment program for each beneficiary's subaccount within the Trust.



Tyler joined The Summa Group in January 2005. His responsibilities with them cover all aspects of investment policy, including overseeing the development and implementation of asset allocation strategies.

Prior to joining Oppenheimer and The Summa Group, Tyler spent four years at Wilshire Associates Inc. working with and consulting clients, including public, corporate, endowment and foundation funds, where he was responsible for institutional investment manager research and manager selection.

Tyler obtained his B.S. from California Polytechnic State University at San Luis Obispo. Tyler earned the Chartered Financial Analyst designation from

the CFA Institute and is a member of the Los Angeles Society of Financial Analysts. He resides in Calabasas with his wife and two children.

### **Oppenheimer Trust Co.**

Oppenheimer Trust Co. is retained by Proxy Parent Foundation, to administer the PLAN of California Master Pooled Trust. As Administrator, Oppenheimer Trust Co. reports to Proxy Parent Foundation and provides disbursements and accounting for each individual subaccount. It also prepares and delivers tax information and requisite regulatory filings.

James Carley, President of Oppenheimer Trust Co., works directly with Proxy Parent Foundation and has over 30 years of experience and a deep understanding of Special Needs Trust administration. He began his career in the banking industry in 1972 and prior to joining Oppenheimer, he managed Webster Trust Company, a \$1.3 billion Limited Purpose Trust Company.

Oppenheimer Trust Company, a limited purpose bank, offers a complete line of trust services and operates in all 50 states.

For more information, please visit our website at [www.proxyparentfoundation.org](http://www.proxyparentfoundation.org).

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