

City of Lincoln Appointment Application

PERSONAL INFORMATION

Application Date: 7/15/2009
Salutation: Mrs. **Applicant Name:** Garrett-Ferguson, Rebecca
Legal Residence: 3401 South Hope Court **City/State/ZipCode:** Lincoln, NE 68502
Residence Telephone: (402) 486-1267 **Business Telephone:** (402) 323-1334
Applicant Occupation: AVP, Inv. Officer, Port. Mngr **Employer:** Union Bank & Trust Company
E-mail Address: becky.ferguson@ubt.com
Affirmative Action Information: Sex Female **Racial/Ethnic Background:** Caucasian/White

EDUCATION

Northeast High School, 1975
UNL - off and on, no degree
NASD - Series 7
Certified Financial Planners Board, CFP designation
Many ABA and Life Insurance classes and licenses held

PRESENT OR PREVIOUS COMMUNITY/VOLUNTEER ACTIVITIES

Salvation Army Advisory Board
Many through Union Bank

EMPLOYMENT

All in Lincoln - Security Mutual Life- 1977; J. Gregg Smith Advertising 1982; First Mid America 1984; Formed BLN Investment Corp for Bankers Life of Nebraska (which became Ameritas) 1984-1987; Bankers Life Des Moines (Agent, Reg. Rep) thru 1990; National Bank of Commerce from 1990 to 2000; Union Bank & Trust since 2000. I have worked in the financial services industry for over 25 years. I have sold investment and insurance products, managed portfolios for corporations and individuals and wholesaled for College Savings Plan of Nebraska and the Nebraska Public Agency Investment Trust (through Union Bank). Currently I manage equity and fixed income portfolios for the Union Investment Management Group where we have approximately \$8.7 billion under management. Also, I am a CFP and use my designation to assist high net worth individuals with their financial planning needs through Union Bank.

Board(s) Requested

Police And Fire Pension Plan Investment Board