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July 5, 2018

Pamela P. Epting  
Interim Commissioner  
Florida Office of Financial Regulation  
200 E. Gaines Street  
Tallahassee, FL 32399

Dear Ms. Epting and Search Participants,

Please consider my credentials for the position of Commissioner at Florida Office of Financial Regulation (Position Number: 43004009). My background is ideal for this leadership role, having learned and served in both higher education and the off-campus working world.

My ability to pinpoint crucial determinants of success, enliven interest, and drive results has been refined in past assignments as college professor, investment writer, senior (investment) research analyst, director of strategic planning, and chief economist.

I have over two decades of successful teaching, administrative, and leadership experience at 10 different higher education institutions. My academic career includes nine years at College of the Ozarks in southwest Missouri, including four years as Manager of the Robert W. Plaster School of Business, and most recently with Flagler College – Tallahassee as Adjunct Assistant Professor in Business Administration, teaching Money and Banking.

The manager position at C of O included the hiring, retention, and training responsibilities for 12 workers and coordinating the entire budget process at the school level. I was the point person for all business administration affairs on campus. My leadership, teaching, and communication skills were instrumental in developing the Business Administration program into the top field on campus in terms of enrollment, declared majors, and program matriculation.

I have a further ten years of experience in financial and research-related industries involving strategy, financial due diligence, and public policy research. This includes Pension Consultants, Inc., a financial advisory firm in Springfield, Missouri, where assets under advisement rose from \$0.9 billion to \$1.7 billion during my time there as Senior Research Analyst and Deputy Director of Investment Services.

Although my time with American Century Investments was brief, my writing contributions were noteworthy. My primary focus area was value equity, in which I wrote commentaries for Phil Davidson. I also authored three thought leadership pieces under my own name and contributed to writing in the REIT and international equity spaces.

My time in the private sector also includes nearly three years as Director of Strategic Planning at MacFarlane Group, a financial services firm, in Mission, Kansas. MFG was a mid-sized, complex, global corporation with operations in Kansas City, Las Vegas, London, and San Juan, Puerto Rico.

During my time at Florida TaxWatch as Chief Economist, my greatest achievements were in devising complex solutions to advance economic development and technology transfer in the State of Florida. My work resulted in two big wins for our clients, helping to make the case for the Florida legislature to provide funding for an advanced manufacturing consortium and to extend the manufacturing equipment sales tax exemption during the 2016 legislative season.

By partnering with professional colleagues, business associations, Florida agencies and legislators, and by authoring new research and making compelling presentations, TaxWatch and I helped win the day for Florida advanced manufacturing, capital-intensive companies, and the overall state economy.

My current full-time work assignment is with HNTB Corporation in Tallahassee, Florida as Senior Marketing Coordinator and Technical Writer. My administrative and thought leadership work helps ensure the continued profitability of HNTB in the Northwest Florida region of operations. Additionally, I teach part-time for Flagler College in Tallahassee. The courses I teach are Principles of Macroeconomics and Money and Banking.

In each of the roles outlined above, it was my research and communications skills, along with my leadership and strategic know-how that made the difference and brought about success. The value proposition I would bring to this role is rich and diverse. My skillset includes:

- The ability to frame/analyze issues that comes with real-world experience and a PhD in Economics
- Strategic & program planning know-how & success
- Learning & leadership development and mentoring expertise
- Successful leadership, consensus building, and research project expertise
- Aptitude in finding answers to complex business questions
- Effective writing/communication at all levels, for all audiences.

Thank you for your consideration. My family resides with me in Tallahassee and very much supports me in pursuing and achieving success in this role.

Sincerely yours,

Steven T. Petty, Ph.D.

<https://www.linkedin.com/pub/steve-petty/53/840/801/>

**STEVEN T. PETTY**

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**PROFESSIONAL EXPERIENCE****2017 to present HNTB Tallahassee, Florida**

- **Senior Marketing Coordinator**; high-level research and writing including white papers, technical guides, and marketing materials for this firm providing infrastructure solutions.

**2017 to present FLAGLER COLLEGE – TCC Campus - Tallahassee, Florida**

- **Visiting Professor**; teaching accelerated program courses in economics and business.

**2016 to 2017 UNITED STATES POSTAL SERVICE - Tallahassee, Florida**

- **Postal Support Employee**; full-time PSE duties at the processing and distribution center.

**2015 to 2016 FLORIDA TAXWATCH Tallahassee, Florida**

- **Chief Economist**; duties included expert research, writing, and presentation of facts, findings, and theories regarding Florida's state & local government taxation, expenditures, policies, and programs. Carried out legislative tracking for research; attendance at appropriations committee meetings.
- Provided leadership to FTW's "Center for Competitive Florida", junior staff, and interns; and delivered marketing insight as a prominent participant in FTW's Speakers Bureau.

**2012 to 2015 MACFARLANE GROUP Mission, Kansas**

- **Director of Strategic Planning**; strategic planning for the corporation, including call center operations, workshop facilitation, business reporting, economic prognostication, and workforce planning and efficacy to enhance the strategic capabilities, marketing, proposal writing, and corporate culture of this financial services firm; MFG has five locations, domestic and overseas.

**2011 to 2012 AMERICAN CENTURY INVESTMENTS Kansas City, Missouri**

- **Financial Writer in Client Communications Dept.**; macroeconomic and value equity research; AP style writing of white papers, investment bulletins, *Weekly Market Update* weblog postings, *Quarterly Update for Financial Professionals* articles - financial education and marketing content.
- Coordinated interdisciplinary teams within product development, client-portfolio management, digital design, and institutional product R&D to enhance thought leadership client communications.

**2008 to 2011 PENSION CONSULTANTS, INC. Springfield, Missouri**

- **Senior Research Analyst & Deputy Director of Investment Services**; responsible for all investment research and communications which were instrumental in growing the company's assets under advisement from \$0.9 billion to \$1.7 billion in the four short years I was there; formulated and presented co-fiduciary recommendations to corporate boards of directors, and developed defined contribution plan education deliverables and supervised Investment Services personnel.
- Authored internal *Market Update* newsletter, white papers, company bulletins, marketing thought-leadership pieces, delivered research, due diligence, and proposals to pension plan committees.

**1998 to 2007 COLLEGE OF THE OZARKS Point Lookout, Missouri**

- **Professor of Economics & Business and Manager of the Plaster School of Business** Taught, managed, and developed curriculum for nine years.
- Created the Economics & International Business emphasis areas for the Business program with four years of leadership, management, and human resources experience as the School of Business Manager; responsible for the hiring, retention and supervision of 12 employees.
- Promoted to full professor in nine years; strategy experience on the Academic Council, Faculty Welfare Committee, Athletic Committee, and served twice as Academic Standards chairperson.
- Responsible for program growth so that business became the #1 major on campus by 2004.

**2008 to 2011 OZARKS TECHNICAL COMMUNITY COLLEGE** Springfield, Missouri

- **Instructor of Economics;** taught Principles of Economics part-time during fall 2007
- Taught Principles of Macroeconomics full-time during spring 2008 semester – temporary replacement for faculty member deployed to Iraq for six months.

**2005 to 2007 DRURY UNIVERSITY** Springfield, Missouri.

- **Adjunct Instructor of Economics;** taught economics night classes during summer, spring, and fall semesters to traditional and non-traditional students both off-site and on the main campus.

**1992 to 1998 OKLAHOMA STATE UNIVERSITY** Stillwater, Oklahoma.

- **Teaching Associate of Economics;** employed as a full-time tenure-track economics instructor while pursuing Ph.D. degree.
- Courses taught: The Economics of Social Issues, Introduction to Macroeconomics, International Economic Relations, Introduction to Microeconomics, and The Economics of Industries.

**Summer 1996 ORAL ROBERTS UNIVERSITY** Tulsa, Oklahoma

- **Instructor of Economics;** taught Economic Theory (GBUS 582) as a temporary instructor during the summer semester; the course (required for MBA) was comparable to a masters-level managerial economics course

**1989 to 1992 NORTHWESTERN OKLAHOMA STATE UNIVERSITY** Alva, Oklahoma

- **Tenure-track Instructor of Economics;** employed as a full-time, tenure-track economics instructor, served on university salary and academic appeals committees, left NWOSU to pursue Ph.D. degree.
- Courses taught: Principles of Macroeconomics and Microeconomics, Contemporary Economic Problems, Money and Banking, International Economics, Comparative Economic Systems, Urban Economics, Intermediate Macroeconomics, Labor Economics, Public Finance, History of Economic Thought, and Introductory Statistics.

**1989 JOHNSON COUNTY COMMUNITY COLLEGE** Overland Park, Kansas.

- **Adjunct Instructor of Economics;** employed as a part-time economics instructor during the spring and summer semesters; taught Principles of Microeconomics and Principles of Macroeconomics

**1989 METROPOLITAN COMMUNITY COLLEGES** Blue Springs Campus, Kansas City, Missouri

- **Adjunct Instructor of Economics;** employed as a part-time, adjunct economics instructor, taught Principles of Macroeconomics during the spring semester

**1987 to 1988 UNIVERSITY OF CENTRAL MISSOURI** Warrensburg, Missouri.

- **Teaching Associate of Economics;** responsible for teaching two sections per semester; Taught Principles of Macroeconomics, Economics of Social Issues, and Public Finance.

**EDUCATION****Ph.D. in Economics 2001** Oklahoma State University, Stillwater, Oklahoma

- Primary fields: Industrial Organization (Antitrust dissertation), Labor Economics
- Secondary fields: Urban and Regional Economics, Public Sector Economics

**M.A. in Economics 1988** University of Central Missouri, Warrensburg, Missouri

- Concentrations: Monetary Economics, History of Economic Thought, and International Economics

**B.S. in Business Administration 1986** Missouri Western State University, St. Joseph, Missouri

- Major: Economics Minor: Political Science - International Affairs emphasis

**PUBLISHING, EDITING, & WRITING**

Author of two small pieces, "Before There Was Money" and "Up-to-Date Economic Statistics" for Great Ideas for Teaching Economics, 5th ed., Ralph Byrnes and Gerald Stone, eds., Harper Collins, 1992.

Author of "Tuition and Land-Grant College Characteristics", submitted as partial fulfillment of course requirements to Dr. Wade Bransen for AGE 6213, Advanced Econometrics, Oklahoma State University; April 26, 1995.

Co-author of "Sample Selection Bias and Educational Production Functions", which I presented at the Missouri Valley Economic Association meetings in Memphis, March 1996.

Author of two contributions to the Biographical Dictionary of Secretaries of the Treasury, Greenwood Publishing; November 1996. I wrote on former Treasury Secretaries Blumenthal and Miller.

Reviewer for Macroeconomics Principles and Applications, Hall and Lieberman, South-Western College Publishing, 1998.

Reviewer for paper submitted to the MVEA Journal of Economics, "Edward Taylor and the Poznan School of Economics", 1999.

Reviewer for Economic Issues and Policies, Brux, South-Western, 2000 and Industrial Organization, Church/Ware, McGraw-Hill, 2000.

Reviewer for Principles of Macroeconomics, Hubbard/O'Brien, Prentice-Hall; 2006.

Author of "Should Inflation be of Concern?" Investment Bulletin, Pension Consultants, Inc.; April 2010.

Author of "Understanding the National Debt: Are we at a crossroads?" White Paper, Pension Consultants, Inc., July 2010.

Author of "Value Traps and Investor Psychology", Thought Leadership paper, American Century Investments, December 20, 2011.

Author of "The U.S. Economy: This is How our Game is Played", Thought Leadership paper, American Century Investments, January 31, 2012.

Author of "Uncovering Equity Yield Traps", Thought Leadership paper, American Century Investments, March 27, 2012.

Author of "Current Economy Provides Toeholds but Not the Looked-for Traction", Thought Leadership bulletin, self-published on Articles Factory website, February 15, 2013.

Co-author of "Could Florida Be the Next High-Tech Hub?" Florida TaxWatch Briefing, May 2015.

Primary author of "Extending the Manufacturing Machinery & Equipment Sales Tax Exemption", Florida TaxWatch Research Paper, November 2015.

MISC: Past member of the American Economic Association & American Management Assoc.

Eagle Scout, BSA 1980

**ADDENDUM TO VITA****STEVEN T. PETTY****EDUCATIONAL PROJECT MANAGEMENT EXPERIENCE**

**1993 to 1994** NATIVE AMERICANS IN BIOLOGICAL SCIENCES SUMMER INSTITUTE  
Oklahoma State University, Stillwater, Oklahoma. During the 1993 NABS summer camp I was employed by NABS as the Policy Group Manager. As such, I researched all aspects of water ecology, in particular, waste-water treatment and public policy. I then developed original curriculum content and trained two teen-aged Native American high school students in the public policy aspects of raising the standards for waste-water treatment for the city of Cushing, Oklahoma. Included in the students' training was sample survey design, information collecting, and reporting activities. Each student group completed a number of team-building exercises developed in part and facilitated by the group managers. During the 1994 NABS summer camp I served as the Computer/Technology Manager for the student groups. That summer NABS researched the issue of "Property Rights and Native American Traditional Medicines". The NABS project was funded from a \$2 million grant from the Howard Hughes Medical Foundation. Microbiologist Dr. Alan Harker headed the project but has since moved on to Brigham Young University. The purpose of NABS was to raise awareness of the importance of biological sciences in public policy and to increase the recruitment and retention of Native Americans into the biological sciences. The emphasis in both summer camps was to mentor effectively so as to equip and inspire students to solve problems on their own.

**SECONDARY & ELEMENTARY TEACHING EXPERIENCE**

**1989** THE SCHOOL DISTRICT OF ST. JOSEPH St. Joseph, Missouri. While teaching night courses at community colleges, during the day I substitute-taught for all grade levels until my long-term (3-month) substitute assignment at Central High School. Responsibilities included curriculum development and teaching Applied Economics, Geography, and Law and the Citizen courses.

**ADDITIONAL WORK EXPERIENCE**

**1985 to 1986** MISSOURI DIVISION OF EMPLOYMENT SECURITY St. Joseph, Missouri. I was employed part-time as a work-study deputy while finishing my last year of undergraduate studies at MWSU. My duties included interviewing job seekers, coding applicant work experience information, data entry, and matching job experience and training with available positions, as well as making job referrals.

**1982 to 1985** THE SCHOOL DISTRICT OF ST. JOSEPH St. Joseph, Missouri. While attending MWSU as a full-time student, I worked part-time during the academic year and full-time during summers at the district's administrative offices and print shop. My duties included the delivery of the school board newsletter, operating/maintaining an offset printing press and large (Xerox 9200 and 9400) photocopy systems, and operating the district office switchboard system. I helped develop the process layout in the new school district print shop in 1985.

**STEVEN T. PETTY****Research and Writing Sample Links****2015 to 2016 FLORIDA TAXWATCH Tallahassee, Florida Chief Economist**<https://drive.google.com/file/d/0B0hndyzcckHjRUhpb1FKQjBuNTQ/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjd3FHR1FxcXY1bFE/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjLXNaUnJ4UIB5RjA/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHITtc0QW54LVsOFE/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjd0JYUVJ6N3dSU3c/view?usp=sharing>**2012 to 2015 MACFARLANE GROUP Mission, Kansas Director of Strategic Planning**<https://drive.google.com/file/d/0B0hndyzcckHjTVRUMnV3WERMckU/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjQWd6NERBUGVEX2M/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjdEFteVdSbtJWSVU/view?usp=sharing>**2011 to 2012 AMERICAN CENTURY INVESTMENTS KC, Missouri Financial Writer**<https://drive.google.com/file/d/0B0hndyzcckHjV3Vsc254X0RnYIk/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjV25RSHh0SnVnX00/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjOUh6cC1TNIFHU28/view?usp=sharing>

The following links are to pieces I ghost-authored for various ACI officers.

<https://drive.google.com/file/d/0B0hndyzcckHIMmYtYUZ0aDBvLVE/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjYktSTmNHF3hhOUE/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjZfVsq2NINmXvMwS/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjeVZNZ0NlcHdMZVE/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjZUJxaDBYQVFRsZYk/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjc0N3Tk85NC02WJA/view?usp=sharing>**2008 to 2011 PENSION CONSULTANTS, INC. Springfield, MO Sr Research Analyst, & Deputy Director, Investment Services**<https://drive.google.com/file/d/0B0hndyzcckHjMDRTZ3ZpSUcyYWM/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjOXp0N0NyM2YtZGM/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjU3p2ZkJFRk56bk0/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjdUpsNv0xdFVEcm8/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjOC1qYzhjRVNUaXM/view?usp=sharing>**1998 to 2007 COLLEGE OF THE OZARKS Point Lookout, Missouri Professor of Business & Economics, Manager of RWP School of Business**<https://drive.google.com/file/d/0B0hndyzcckHjCXYzNFBZnJTSk0/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjT1RkVGNyC0M2T28/view?usp=sharing><https://drive.google.com/file/d/0B0hndyzcckHjMHMtaGdld3lUcjp/view?usp=sharing>

**General References for Steve Petty, Ph.D.**

**Dr. George Wilson**                               1612 Roanoke Drive, Warrensburg, MO 64093  
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Mentor, Provost Emeritus, University of Central Missouri

**Dr. Tim Bisping**                                 1936 North Street, Nacogdoches, TX 75962  
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Colleague, Dean of the College of Business, Stephen F. Austin State University

**Dr. Al Dixon**                                      200 Creekside Road, Forsyth, MO 65653  
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Colleague, Professor at College of the Ozarks

**Ms. Angle Adamick**                             900 N. Benton Avenue, Springfield, MO 65802  
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Colleague, MBA Director at Drury University in Springfield, MO

**Mr. Jim Finnegan**                               12900 Glenwood, #207, Leawood, KS 66209  
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Director, Product Management, and Investment Writer, American Century Investments

**Mr. David Richards**                             14241 Dallas Parkway, Dallas, TX 75254  
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Supervisor, Chief Investment Officer – formerly of Pension Consultants, Inc.

**Mr. Russell Bailey**                             1108 NE Independence Ave., Lee's Summit, MO 64086  
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Colleague, Investment Advisory – Waddell & Reed, formerly of Pension Consultants, Inc.

**Ms. Kay Muman**                                 3634 S. Fort Avenue, Springfield, MO 65807  
(417) 447-8257    [mumank@otc.edu](mailto:mumank@otc.edu)  
Supervisor, Division Director – Social Sciences at Ozarks Technical Community College

**Mrs. Beverly Reichert**                         1146 S. Pickwick Avenue, Springfield, MO 65804  
(417) 269-3873    [beverly-reichert@coxcollege.edu](mailto:beverly-reichert@coxcollege.edu)  
Supervisor at Drury University, now at Cox College in Springfield, MO



**Florida References for Steve Petty**

Dr. Donald K. Parks  
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(904) 377-6534 [parksd@tcc.fl.edu](mailto:parksd@tcc.fl.edu)  
Dean of the Campus – Flagler College - TCC

Dr. Frank Trombino  
Tallahassee, Florida  
(850) 201-8634 [ftromb1035@msn.com](mailto:ftromb1035@msn.com)  
Direct Supervisor at Flagler College – TCC, Chair of Dept. of Bus. Admin. & Accounting;  
Dr. Trombino is transitioning to MBA Program Director at Thomas University, Fall 2017

Mr. John Williams  
Tallahassee, FL 32301  
(850) 294-9199 [j.h.williams@usps.gov](mailto:j.h.williams@usps.gov)  
Direct Supervisor at USPS, Tallahassee P & DF

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Professional colleague, Chief Economist at Florida Chamber Foundation

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