

2019 Nominee

George Lange
Tampa

Board Nomination Form

Nomination Information:*

- I am nominating myself.
- I am nominating myself on the recommendation of someone else.
- I would like to nominate the following individual.

Candidate Information:

Nominator:*

Casey
First Name

Fletcher
Last Name

Preferred Email Address:*

cfletcher@palletone.com
Nominator Email

Nominee:*

Mr
Prefix

George
First Name

Lange

Last Name

Nominee Preferred Email Address:

glange@slickrockcapital.com

Nominee Email

Contact Number:*

(239) 405-2166

Contact Number Type:*

Cell Number ▼

Nomination Comments or Remarks:*

350/350

350 Characters

If available, please upload resume (no more than 3 pages) here.

CHOOSE FILE

No File Chosen

File uploads may not work on some mobile devices.

SUBMIT FORM

HTML Form Creator



General Questions:

Laurie Berlin

From: George Lange
Sent: Friday, July 19, 2019 4:02 PM
To: Steve Seibert
Cc: Laurie Berlin
Subject: Fw: Florida Humanities Council (FHC)

Dear Steve.

This will confirm my desire to serve as a Board Member of the Florida Humanities Council. In that regard I am fully committed to:

1. Preparing for, attending and participating in Board's 2020 meetings which are scheduled for February 7, May 8, and September 24-25;
2. Actively participating in committee work;
3. Attending local and regional FHC sponsored events to evaluate programs and promote the Council's work.
4. Serving as an Ambassador to promote the humanities by communicating and participating with civic, community, religious and business groups and the public and encourage people to join the Council.
5. Continuing to support the FHC financially at current levels or higher;
6. Assisting with legislative matters; and
7. Recruiting new Board members.

Should you need anything else please advise.

Sincerely,

George

George Lange

----- Forwarded Message -----

From: Laurie Berlin <lberlin@flahum.org>
To: George Lange <gl4trust@yahoo.com>
Sent: Friday, July 19, 2019, 02:47:57 PM EDT
Subject: Florida Humanities Council (FHC)

Hi George,

Laurie Berlin

From: Steve Seibert
Sent: Tuesday, June 4, 2019 2:02 PM
To: Laurie Berlin
Subject: FW: FHC Board nomination
Attachments: George Lange Resume CV Updated May 13 2019.docx

Importance: High

Did you get this?

Steve

Steven M. Seibert, J.D.
Executive Director
Florida Humanities Council
599 2nd Street South
St. Petersburg, FL 33701
office: 727-873-2007
cell: 850-321-9051
email: sseibert@flahum.org
web: www.FloridaHumanities.org

From: Casey Fletcher <cfletcher@palletone.com>
Sent: Tuesday, June 4, 2019 1:29 PM
To: Steve Seibert <sseibert@flahum.org>; Joseph Harbaugh FHC <harbaughj@nsu.law.nova.edu>; Sandy Rief (<SRief@allendell.com> <SRief@allendell.com>); Glenda A. Waters PhD <waltegadr@knology.net>; Lester Abberger <lesterabberger@nettally.com>; Nancy Poulson <npoulson@fau.edu>
Subject: FHC Board nomination
Importance: High

I nominate George Lange. He is well-acquainted with the FHC from our friendship, a reader of *Forum* and a FHC contributor. He contacted me to express interest.

He just had a long conversation about FHC, our challenges and opportunities: loss of State funding, fundraising generally, the ideas for civic education & DoFI and some others. He does not join a board unless he sees a challenge – I think I offered him a couple.

Steve, please give him a call and see if yawl can have lunch. Perhaps he could visit in the office.

Casey A. Fletcher, CPA CGMA
Vice President of Finance
PalletOne, Inc.
6001 Foxtrot Avenue (33830)
Post Office Box 819
Bartow, Florida 33831
863-496-3054 (messages will forward to my cell phone)
cfletcher@palletone.com

From: George Lange <gl4trust@yahoo.com>

Sent: Tuesday, June 4, 2019 1:00 PM

Casey,

Nice to catch up today. Per our conversation attached is my current CV. Highlights relative to my interest in a potential board opportunity with the Florida Humanities Council include

- WUSF Public Media Advisory Board, member and current Chair
- WFCU Public Media Advisory Board, member
- Gulf Coast Art Museum, board member
- United Arts Council of Collier County, Board member and President. While President conducted the first countrywide cultural assessment of Collier County
- Naples Theater Ensemble

Best,

George

GEORGE W. LANGE, JR., CTFA, TEP
6104 Yeats Manor Drive
Tampa, Florida 22616
(239) 405-2166
g.lange@slickrockcapital.com

BUSINESS EXPERIENCE

Slick Rock Capital Partners, Inc, Tampa, Florida
Executive Managing Director

2017 to present

Personal family office providing a range of services relating to venture capital investment, private foundation and donor advised fund administration and expert witness services for attorneys around fiduciary and investment issues.

Wells Fargo Bank, N.A. (Private Bank), Tampa, Florida

2013-2017

Senior Vice President/Regional Manager of Investment and Fiduciary Services for the Greater Gulf Coast

Responsible for the management of \$1.5 billion of assets under management for HNW clients of the Private Bank from Tampa to Naples. Fourteen direct reports including fiduciary specialist and portfolio managers in three offices (Tampa, Sarasota, and Naples). Additional duties included oversight and coordination with our specialized wealth services such as estate settlement, real estate, life management, philanthropic, etc.

Regions Bank (formerly AmSouth Bancorporation), Tampa, Florida

2003 to 2012

Senior Vice President/Senior Trust Officer (Tampa)	2012 to 2012
Senior Vice President/Area Trust Executive South Florida (Coral Gables)	2009 to 2012
Senior Vice President/Area Trust Executive Southwest Florida (Sarasota)	2007 to 2008
Senior Vice President/Personal Trust Manager West Florida (Tampa)	2004 to 2006
Senior Vice President/Senior Portfolio Manager (Naples)	2003 to 2004

Held a variety of roles from player/coach to regional manager handling the day-to-day administration and investments of trust and estates.

State Street Global Advisors, N.A. (State Street Corporation), Naples, Florida

1997 to 2002

President	2001 to 2002
Managing Director/Chief Fiduciary Officer	1997 to 2001

President and member of the Board of Directors of trust company with assets of \$550 million. Oversaw staff of four officers and four administrative assistants. Direct responsibility for profit and loss. Responsible for legal and compliance activity. Involved in all levels of new business development. Served as portfolio manager for accounts representing \$150 million in assets. Also served as state chairperson for the grant activities of the State Street Foundation in Florida. Contributor to *Focus* and *Gulfshore Life* concerning investment and estate planning matters.

Marshall & Ilsley Trust Company of Florida (Marshall & Ilsley Corporation), Naples, Florida

1994 to 1997

President, Chief Operating Officer and member of the Board of Directors of M&I's Florida affiliate. The M&I Trust Company of Florida had over \$1.2 billion in personal trust assets under management or administration as of September 30, 1997. Oversaw a staff of ten including five officers. In addition to management responsibilities actively participated in development of new business, generating \$200,000 annually. Implemented program to distribute trust and investment services through community banks in Florida. Assets under administration of M&I Trust Company of Florida grew from \$450 million to \$1.2 billion during tenure as President. Achieved highest customer satisfaction rating of all M&I trust offices. Increased net revenue 20% in 1995, 1996 and 1997. Net new business in 1995 and 1996 highest in 12

year history of Marshall & Ilsley Trust Company of Florida. Maintained outstanding regulatory and audit reviews. Also served as member of Management Committee which oversaw the \$28 billion trust and investment operation of M&I. Speaker at state and national seminars on trust and investment planning.

Bancorp Trust Company N.A. (FIRSTMERIT), Naples, Florida

1990 to 1994

Senior Vice President, Trust Officer, Resident Manager
Vice President, Trust Officer, and Resident Manager

1991 to 1994
1990 to 1991

Resident manager of trust company with two offices (Naples and Ft. Myers). Reported to the senior trust officer of holding company. Responsible for day-to-day management including administration, marketing, and investment along with budget and long-range planning. Supervised a staff of four. Member of holding company's trust strategic planning committee established to devise a strategic vision and coordinate plan for the delivery of trust services through our affiliate banks. One of only two trust officers to be included in senior officer incentive plan. Major accomplishments include growing the trust company to \$80 million after opening in February 1990 together with generating a net after tax profit after second year of operation. Achieved outstanding audit and regulatory reviews. Frequent contributor to *Naples Daily News* on estate planning topics for the Naples Estate Planning Council.

American Pioneer Savings Bank (American Pioneer Inc.), Orlando, Florida

1987 to 1990

Vice President, Senior Trust Officer and Manager of Investment & Fiduciary Services Division. Reported to the President of bank and holding company. Responsible for all aspects of division operation. Department had \$125 Million in assets equally divided between personal and institutional, primarily 401(k) plans. Supervised a staff of eight people. Major accomplishments included turning around failing trust operation, initiated employee trust training ("Winning Trust") along with a sales incentive program and improved the total effectiveness of department as reflected by both internal audit and regulatory examination.

Mark Twain Bank N.A. (Mark Twain Bancshares, Inc.), St. Louis, Missouri

1984 to 1987

Senior Vice President/Manager of Trust Administration/Trust Counsel
Vice President, Corporate Trust Manager

1985 to 1987
1984 to 1985

Rose to become No. 2 person in Trust Division. Reported to President of Trust Division. Successfully created corporate trust operation. Member of Trust Committee which included the Presidents of the holding company and lead bank. Responsible for supervision of a staff of 10 professionals along with support staff of seven involved in the administration of personal trust, corporate trust and employee benefit accounts that aggregated approximately \$650 Million. During tenure the Trust Division grew by \$500 million of assets under management/administration. Major accomplishments included coordinating the merger of the trust department of out-of-state acquisition, worked with senior management of holding company on the development of trust sales incentive program, and participated in the first ESOP completed for a local public company. Speaker for local Bar CLE programs on 401(k) implementation and ESOPs.

Mercantile Bank N.A. (Mercantile Bancorporation, Inc.), St. Louis, Missouri

1979 to 1984

Trust Officer/Assistant Secretary
Assistant Trust Officer
Assistant Trust Counsel

1982 to 1984
1980 to 1982
1979 to 1980

Began trust career as Assistant Trust Counsel and advanced to become assistant manager of corporate trust department which administered approximately \$4 Billion of municipal and corporate debt issues. During this period had direct responsibility for in-house legal support, administration of all industrial revenue bond issues, training of department staff and marketing. Designated to advise the Treasurer of the State of Missouri concerning collateral for state deposits and use and perfection of security interests in book entry securities. Selected as one of the first three bank officers to participate in initial internal management development program.

Law Office of Thomas R. Green, St. Louis, Missouri

1978 to 1979

Associate with law firm specializing banking and commercial litigation.

Sachs & Miller, P.C., St. Louis, Missouri

1977 to 1978

Associate with law firm specializing in personal injury, insurance subrogation and commercial litigation.

Limbaugh, Limbaugh & Russell, Cape Girardeau, Missouri

1972 to 1974

Officer Manager of six attorney law firm.

EDUCATION

BA, *cum laude*, Southeast Missouri State University, 1972

JD, St. Louis University School of Law, 1977

Southwestern Graduate School of Banking at Southern Methodist University, 1980, 1981

PROFESSIONAL ORGANIZATIONS

Missouri Bar (1977 to present)

American Bar Association (1978 to present)

Section of Real Property, Probate and Trust

- Coordinator of Subcommittee on Fiduciary Issues in Holding Closely-Held Businesses in Trusts (1992-1995)
- Member, Committee on Estate Planning and Estate Administration for Business Owners (1992-1998)
- Member, Committee Charitable Organizations (2002 to present)
- Member, Committee Charitable Planning (2003 to present)
- Speaker at Section's 1994 Spring Meeting in Washington DC

Florida Bankers Association (1990 to 2017)

- Member, Board of Directors (1999-2000)
- President, Trust Division (1999-2000) and member of Trust Executive Committee (1997-2002)
- School Director, Florida Trust and Graduate Trust School (2006 to present) and lecturer Charitable Planning
- Member, Vice Chair and Chair (2 years) of Trust Legislative Committee (1993-2010)
- Member, State Governmental Relations Committee (2001-2003)
- Director-At-Large, Florida BankPac (1998-2006)
- FBA Liaison to the Section of Real Property, Probate and Trust of the Florida Bar Association (1995-2003)
- Contributor to *Florida Bankers* magazine with articles "The Effect of the Phrase-Out of the Federal Estate Tax Credit" (March 2005) and "Hoppin' to HIPPA" (September 2005)

Florida Bar

- At-Large-Member of the Executive Council of the Real Property Probate and Trust Law Section 2000 to 2016.
- Fiduciary Chair of the Attorney Trust Officer Liaison Conference 2001-2004
- Speaker, Florida Bar Attorney/Trust Officer Liaison Conference 1995, 2002, 2003 and 2013.
- Speaker, Advanced Estate Planning Program in 1996.

Attorneys for Closely-Held Enterprises (afhe) (1994 to 2000)

- Speaker, afhe 1996 Spring meeting in Chicago

Certified Trust and Financial Advisor by the Institute of Certified Bankers (1992 to present)

Dade County Bar Association (2009 to 2012)

Society for Trust and Estate Practitioners 2009 to present

Estate Planning Council of Greater Miami 2011 to 2012

Coral Gables Bar Association 2011- 2012

Pinellas Estate Planning Council (2006 to 2008)

Clearwater Bar Association (2006 to 2009)

St. Petersburg Bar Association (2006 to 2009)

- Speaker, Spring 2008, FDIC Deposit Insurance Coverage

Corporate Fiduciary Association of Southwest Florida (1990 to 2004)

Estate Planning Council of Naples (1990 to 2000)

Estate Planning Council of Central Florida (1987 to 1990)

Estate Planning Council of St. Louis (1985 to 1987) T

Metropolitan Bar Association of St. Louis (1978 to 1987)

- Speaker, 1985, ESOP Implementation
- Speaker, 1986, 401(k) Investments

CIVIC ACTIVITIES

Leadership Florida (1997 to present), Board of Directors, Council of Advisors and Member of the Finance Committee
Social Venture Partners Tampa Bay (2013 to present)
James Madison Institute, Tampa Advisory Committee (2012 to present)
Defense Orientation Conference Association (2017 to present)
Gulf Coast Art Museum, Director (2007-2008)
WUSF Public Media, Advisory Board (2006 to 2008 and 2013 to present,
WVCU Public Media, Member of Board (2000 -2005)
Hodges University, Member of President's Council (2000 to 2007)
New College, Member of Advisory Committee on Environmental Studies (2004 to 2006)
United Arts Council of Collier County, President (3 years), Vice President and Board member (1991 to 2003)
Mental Health Association of Collier County, President, Treasurer and Board member (1990 to 1995)
Naples Area Chamber of Commerce (1990 to 2000), President's Club, Chairman of Education Committee (1991-1993)
Leadership Collier (1992)
Richard L. Higgins Foundation, Chairperson and Board Member (1994 to present)
Edison Community College, Member and Chair (1996) of the Friends of Edison Collier (1994 to 1996)
Economic Development Council of Collier County, Trustee (1996 to 2002)
Bonita Springs Firefighters Retirement Plan, Trustee (1995 to 2002)
Southwest Florida Chamber of Commerce (1992 to 2002)
Leadership Lee County (1993)
Southwest Florida Business Hall of Fame, Advisory Director (1991 to 1996)
Rotary Club of Naples (Paul Harris Fellow)
Mental Health Association of St. Louis, Board member and Treasurer (1980 to 1983)
Mental Health Association of Missouri, Board Member (1981 to 1982)

AWARDS/RECOGNITION

Florida Bankers Association, Trust Banking Hall of Fame, 2017 Inductee
Florida Bankers Association, Trust Banker of the Year 2002
Edgerly Community Service Award (2000) (State Street Corp)
Alberta Peacock Leadership in the Arts from the United Arts Council of Collier County (1994)
Golden Bell from Mental Health Association of Collier County (1992)

MILITARY

Retired in 1994 from the Missouri Army National Guard with rank of Lieutenant Colonel after enlisting in 1971. Served in a variety of capacities which included platoon leader, company executive officer, company commander and various staff positions (engineer liaison officer, battalion SI, brigade operations officer, state training officer and corps rear battle officer). Graduated from the Engineer Officer Basis Course and Engineer Officer Advanced Course and attended Army Command and General Staff College. Served in joint military exercises in Japan, Korea and Panama and participated in numerous state emergency duty operations. Member of Society of American Military Engineers and Life Member of Reserve Officers Association and Military Officers Association. Awards include two Army Achievement Medals.