



# Precious Metals Workgroup

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## Workgroup Member Biographies

### **Treasurer Marlo Oaks**

Marlo Oaks is Utah's 26th State Treasurer. He was appointed in July 2021 and then elected in November 2022 to finish his predecessor's term. Marlo spent most of his career in money management and is one of only two state treasurers with institutional investment management experience.

Because of Marlo's knowledge of the capital markets, he is leading the national charge to protect economic freedoms. He has appeared on national programs, including Glenn Beck, The HighWire, and Tucker Carlson, and written articles for The Wall Street Journal and The Daily Wire, among other outlets.

Marlo graduated with a degree in economics from Brigham Young University and an MBA from the University of California, Los Angeles Anderson. He also holds the CFA and CAIA investment designations. He and his wife, Elaine, reside in Bountiful, Utah and are the parents of six children.

### **Representative Ken Ivory**

Ken Ivory was elected to the Utah House of Representatives in November of 2010, representing District 47.

Mr. Ivory took time from his business, mediation, and estate planning law practice to become a public servant. He also serves as the current president of the American Lands Council, where he dedicates his time to educating legislators and community leaders throughout the states about their jurisdictional rights and duties to manage, protect, and care for the lands within our borders.

Mr. Ivory is the author of *Where's the Line? How States Protect the Constitution*. He and his wife, Becky are the parents of four children.

### **Representative Jefferson Moss**

Beginning legislative service in 2017, Rep. Jefferson Moss represents Utah House's 51st District, a slice of northern Utah County stretching from Bluffdale to just past Saratoga Springs. He currently serves as the House Majority Leader and is an active member and voice in the Executive Appropriations Committee, House Education Committee, and the House Revenue and Taxation Committee.

Growing up immersed in government and campaigns, he naturally opted to study Political Science at Brigham Young University (BYU), going on to obtain a MBA from BYU and a certificate in financial planning from New York University. Each experience lended in providing a key understanding of Federal and State government operations.

Rep. Moss's proceeding career placed him at the forefront of investment management and entrepreneurship. From a small tech startup, portfolio consultant at Spring Capital, to even a Swiss Investment Bank, he developed a business acumen that continues to help guide Utah's leading economy.

Coming back to Utah, Rep. Moss worked across industries in KeyBank, Utah Valley University, and Innovation District at the Point currently as Executive Director.

In his few moments of spare time, Rep. Moss enjoys spending time with his wife, Kim, and their four children. He and his family enjoy attending the number of their children's extracurricular activities, being outdoors, and playing the guitar.

### **Representative Keven Stratton**

With a house full of five daughters and three sons, life was full, varied, and fast-paced. Now as nearly empty nesters, they enjoy their children's families and the joys of grandparenting.

Keven's experience in service began decades ago as he volunteered in the community. The lessons of that service now helps him represent our community's interests.

As an entrepreneur, attorney, and farmer, Rep. Stratton owns and operates a group of companies that employ over 150 wonderful people in the areas of Construction, Agriculture, Manufacturing, Real Estate, and Law. Keven and Laurie believe that success in all areas of life are rooted in honoring Divine Providence and embracing timeless principles of industry, thrift, self-reliance, compassion, transparency, integrity, accountability, agency, personal responsibility, gathering in council, hard work, faith and initiative.

These foundational principles guide Rep. Stratton as he earns trust from constituents, colleagues, and stakeholders, to tackle our State's toughest challenges. Navigating such critical long-term, complex issues is a hallmark of his Legislative service.

## **Senator Kirk Cullimore**

Senator Kirk A. Cullimore Jr. has represented District 9 in the Utah State Senate since he was elected in 2018. He received an Associate's Degree in music from Utah Valley University.

Kirk then served a two-year mission for the Church of Jesus Christ of Latter-Day Saints in the Philippines. After returning, he continued his education and received a Bachelor's Degree in music from Brigham Young University. He subsequently taught music for six years and managed a music teaching studio.

He then went on to pursue a law degree at the University of Oklahoma. He began his law career in Oklahoma primarily in Federal Indian Law including tribal business transactions, gaming law, organization and development of tribal policies and procedures, and administrative law. His practice in Oklahoma also included areas of general business and contract law, property management, fair housing, homeowner association and collections.

He returned to Utah to work for the practice established by his father which focuses on property management, fair housing, collections and real property.

In his spare time, he continues to volunteer his time to music and education as a Chairman of the Board for the Suzuki String Institute, Accompanist for the elementary school choir, former Co-Chair for the Brookwood Elementary School Community Council, and Board member for the Utah Valley University Alumni Association. He also formerly served as the government affairs chair for the Utah Apartment Association. Cullimore currently serves on the Social Services Appropriations Subcommittee, Co-Chairs the Infrastructure & General Government Appropriations Subcommittee, the Business and Labor Standing Committee, the Judiciary, Law Enforcement & Criminal Justice Standing Committee, and the Tax Restructuring and Equalization Task Force.

Senator Cullimore and his wife Heather live in Sandy, Utah with their 6 children. They stay busy with their kids' activities including violin, cello, soccer, etc.

### **Sophia DiCaro, Governor's Office of Planning and Budget**

Sophia M. DiCaro is Executive Director of the Governor's Office of Planning and Budget and a Senior Advisor to Gov. Spencer J. Cox.

Prior to her current role, Sophia was the chief compliance officer for The Cynosure Group, an investment advisory firm in Salt Lake City.

Public service began in 2001 in the Governor's Office of Planning and Budget, where she ran the Utah State Data Center performing demographic and economic analyses and later became a lead budget and policy analyst. She then spent six years in the Governor's Office of Economic Development, first as finance director, and later as deputy director and chief operating officer.

DiCaro taught public budgeting and finance as an adjunct instructor for the Master of Public Administration program at University of Utah for five years and served a term in the Utah State House of Representatives, representing northern West Valley City. She also served as a commissioner for the Utah Alcoholic Beverage Services Commission for several years.

DiCaro serves on multiple boards and commissions and currently chairs the board of trustees for Primary Children's Hospital. Other advisory boards include the Kem C. Gardner Policy Institute,UCAIR (Utah Clean Air Partnership), the Governmental Accounting Standards Advisory Board, the Utah Women's Leadership Institute, the Charter School Finance Authority, and several others.

### **Dan Burton Utah Office of Attorney General**

Dan Burton, General Counsel, joined the Utah Attorney General's Office in 2016. Prior to joining the Office in 2016, he was Senior Corporate Counsel with the Woodbury Corporation. In addition to "other duties as assigned," he oversees government relations for the office, representing the organization before the Legislature and government agencies, develops and implements the office's legislative strategy, and assists in compliance with newly passed statutes. Daniel also oversees government records requests (better known as GRAMA) to the office.

A native Utahn, Daniel graduated from Brigham Young University and earned a law degree from the SJ Quinney College of Law at the University of Utah. His wife Brittany is also an alumna and together they have three beautiful daughters.

## **Howard Headlee, Utah Bankers Association**

Mr. Headlee was appointed President and Chief Executive Officer of the Utah Bankers Association, April 1997. The Utah Bankers Association is a trade association serving the banking industry in the state of Utah, the 5th largest banking state in the U. S. Its membership consists of state and nationally chartered banks, savings banks and FDIC insured industrial banks. Mr. Headlee has been recognized as one of Utah's 100 most influential people.

As leader of the UBA, Mr. Headlee has launched several national initiatives to serve the banking industry including the industry's first "Super PAC" Friends of Traditional Banking.

Mr. Headlee was elected by his peers to serve as Chairman of the National Alliance of Bankers Associations and served in that role during the COVID pandemic where he helped direct the banking industry's response to the pandemic, including the roll out of the Paycheck Protection Program (PPP.)

In addition to his passion for the role banks play in every American's pursuit of Happiness, Mr. Headlee has dedicated much of his life to public education. He founded one of the largest charter public schools in Utah and in 2012, he was appointed by Utah Governor Gary Herbert to serve on the Utah State Charter School Board where he served as Chairman until he retired in 2016. He now serves on the advisory board for the Center for the School of the Future.

Mr. Headlee also served as Chairman and founder of Utah Center for Neighborhood Stabilization. He has also served as Chairman of the Legislative Policy Committee for the Utah Partnership for Education and Economic Development and Chairman of Artistic Resource for Teachers and Students (A.R.T.S. Inc.) a non-profit organization committed to maintaining the influence of the fine arts in Utah's elementary schools.

Mr. Headlee received his Bachelor of Science from the Brigham Young University School of Accountancy and earned a Master of Business Administration from the University of Utah. Howard is a member of the Tabernacle Choir on Temple Square and he and his wife Tana, have six children and live in Sandy, Utah.

### **Christian Chelak, Office of U.S. Senator Mike Lee**

- Legislative Assistant to Senator Mike Lee – policy advisor for budget, tax, banking/financial services, and trade policy issues
- 7 years as a policy aide in the U.S. Senate – 5.5 years with former Senator Pat Toomey of Pennsylvania and last 1.5 with Senator Lee
- Particularly passionate about fiscal and monetary policy issues
- Bachelors degree in Economics and Political Science from Washington & Jefferson College in Pennsylvania
- Born and raised in Pennsylvania

### **Hugh Hannesson**

Hugh is a seasoned executive with over 20 years of experience in the financial technology sector. He currently serves as the CEO of a Fintech business focused on stopping transaction fraud across the consumer and business sectors.

Prior to this Hugh has held leadership roles with IBM, Oracle, Tivoli, ManagerPlus, InMoment and Crewe Capital. He currently holds banking licenses with FINRA and is an independent banker with GT Securities, is CEO of Oxbridge Capital and a Managing Partner in Pulsar Capital Management specializing in sourcing and investing into unique high-tech businesses across the U.S. Hugh played a pivotal role in the founding and funding of Clene Nanomedicine, a unique biotech company dedicated to the discovery and development of modern treatments for ALS, MS and Parkinson's.

Hugh holds an Executive MBA from The University of Oxford and an undergrad degree in Philosophy, majoring in epistemology and logic where he was a Rhodes Scholar nominee.

Outside of his professional pursuits, Hugh has served as President and Chairman of BYU's Division II hockey club and numerous boards and committees focused on children's health and well-being.

## **Gary Crittenden**

Gary is a private investor and executive director of HGGC, a middle market private equity firm where he previously served as Chairman, CEO and managing director.

Before HGGC, Gary was the Chief Financial Officer of Citigroup from 2007 to 2009, where he was responsible for the financial management of the firm during the financial crisis. He was also CFO of American Express Company from 2000 to 2007. Prior to American Express, he was the CFO of Monsanto, Sears Roebuck & Company, Melville Corporation (now CVS) and Filene's Basement. On three separate occasions, the readers of Institutional Investor Magazine named Gary one of the "Best CFOs in America."

Gary spent the first twelve years of his career at Bain & Company in Boston and Munich Germany, where he founded the Munich Office and became partner.

He currently serves on the public company boards of Extra Space Storage, Primerica and Zions Bancorp. He recently was recognized by the National Association of Corporate Directors for the Lifetime Achievement Award.

He graduated with a B.S from Brigham Young University in 1976 and with an M.B.A. from Harvard Business School in 1979. He also received an honorary doctorate degree from Weber State University.

## **Randal Quarles**

Randal Quarles is Chairman and founder of The Cynosure Group, an alternative asset and wealth advisory firm. From October of 2017 through October 2021, Mr. Quarles was Vice Chairman of the Federal Reserve System, serving as the system's first Vice Chairman for Supervision, charged with ensuring stability of the financial sector.

From December 2018 until December 2021, he also served as the Chairman of the Financial Stability Board, a global body established after the Great Financial Crisis to coordinate international efforts to enhance financial stability. He was a key architect of the Fed's crisis response in March of 2020, credited with maintaining the function of the US and global financial systems, as described in the books *Limitless* and *Trillion Dollar Triage*.

Earlier in his career, Mr. Quarles was a long-time partner at The Carlyle Group, a leading global private equity firm, and before that a partner at the international law firm of Davis Polk & Wardwell, where he was co-head of their financial services practice.

Mr. Quarles has been a close advisor to every Republican Treasury Secretary for the last 35 years, including as Under Secretary of the Treasury in the Bush '43 Administration. He has represented the United States in meetings of the Group of Seven, Group of Twenty, and Financial Stability Forum, and was also US Executive Director of the IMF.

## **Kevin Freeman**

Kevin D. Freeman, CFA, is the host of a weekly television program, Economic War Room with Kevin Freeman. This program exposes and explains how economic events are delicately intertwined with our nation's security, all from a Judeo-Christian worldview. The program airs on BlazeTV. It's purpose is to help Americans weaponize their money to defend Liberty, Security, and Values.

Kevin is considered one of the world's leading experts on the issues of Economic Warfare and Financial Terrorism, serving as a Pentagon consultant following the 2008 stock market crash. As such, he has consulted for and briefed members of both the U.S. House and Senate, the HASC, present and past DIA, CIA FBI, SEC, Homeland Security, DARPA, IARPA, ONA, the Naval War College, the Naval Postgraduate School, the Justice Department, as well as local and state law enforcement. His research has been presented in critical DoD studies presented to the Secretary of Defense.

Kevin wrote a business plan for Sir John Templeton in 1990 and helped build the Templeton Private Client Group from inception, ultimately leading the firm as Senior Managing Director. Under his leadership, the firm raised and managed nearly \$2.5 billion of global investments. He left Templeton in 2000 and started his own investment management and consulting firm which operates under Freeman Global Holdings.

Kevin's latest book, Pirate Money: Discovering the Founders' Hidden Plan for Economic Justice and Defeating the Great Reset is released August 2023. His previous bestselling books include According to Plan: The Elites' Secret Plan to Sabotage America (Amazon bestseller); Secret Weapon: How Economic Terrorism took Down the U.S. Stock Market and Why It Could Happen Again (NY Times bestseller) and Game Plan: How to Protect Yourself From the Coming Cyber-Economic Attack (Amazon bestseller). Kevin currently authors the Global Economic Warfare Blog.

Kevin is also Vice Chairman of Galectin Therapeutics (NASDAQ: GALT), a biotechnology company focused on discovery and development of novel therapeutics for Galectin-related diseases. Other directors include Chairman Richard Uihlein (co-founder of Uline, Inc.) and Gil Amelio (former Chairman and CEO of Apple Computer and former Lead Director for AT&T). The company is currently in an adaptively designed Phase 2b/3 clinical trial for NASH Cirrhosis.

Kevin is Founder of the NSIC Institute; a Care Pastor at Gateway Church in Southlake, Texas (along with his wife Marnie); Speaker of the Cherokee Community of North Texas; a Senior Fellow at the Center for Security Policy; former Contributing Editor to Tactics and Preparedness magazine; Trustee at Oklahoma Wesleyan University; and a member of the Advisory Board of First Liberty Institute.