

# City of London - Application for Appointment to a City of London Board or Commission

## Application

Please choose the Board or Commission you are interested in serving on: **London Public Library Board**

## Contact Information

Name: **Michael Herbert**

City: **London**

Province: **ON**

Postal Code: **N6H 2Z8**

## Experience and Qualifications

If you have experience on a London Board or Commission, please provide dates and details. (max. 3000 characters):

**I was a member of the community advisory committee for housing in 2008-2009.**

What do you hope to contribute or learn as part of a Board or Commission? (max. 3000 characters):

**As an allocations committee member and leader at the United Way of London/Elgin, I was privileged to not only work with this agency, but also to visit and learn about the 35 agencies that we support. My role was to evaluate their organizations, both from a financial as well as program delivery point of view. I was able to see the incredible work that these agencies contribute to our community and the innovative ways they were able to help Londoners in need, often with limited resources.**

**I am hoping to take this 20 years of experience to London Public Library as a board member, as well as learn how this organization delivers the services to our community. Libraries have evolved to become hubs to delivery essential services to a diverse community. I am looking forward to be a part of this evolution.**

How will you support the work of a Board or Commission? (max. 3000 characters):

**I am currently a Senior Investment Advisor with TD Wealth, having worked for TD Bank for over 30 years. This experience, along with my experience with non-profits at the United Way, would allow me to contribute to the work of the board from both a financial perspective as well as program delivery. I am flexible in where you feel my expertise would be most appropriate, but my passion has been finding innovative paths to deliver quality programs to those in need. With my many years of experience reviewing programs at the United Way, I hope to bring the many ideas from those agencies I visited to the library, as well as support their core services.**

Please describe additional experience, training, or community involvement that will help you in your role as a Board or Commission Member. (max. 3000 characters):

**I have been a volunteer at United Way of Middlesex/Elgin for over 20 years, serving on their board of directors (2007 - 2008), Chair of the Allocations Committee (2007 - 2009), Chair of the Mental Health Impact Council (2010-2012) and Member of the Agency Partnership and Investment Committee (2016 - 2022) and Allocations Committee (2000 - 2016).**

Attach resume or other document here, if needed: **Michael Herbert resume 2022.pdf**

Attach more files here, if needed:

## Confirmations

I declare the following: **I am a resident of London. ; I am at least 18 years old.; I am not a City employee or Council member.; I understand that my application and any attachments will be included on a public agenda that is published on the City website.**

To help inform our outreach activities, please tell us how you heard about this opportunity:  
(optional): **Professional or community organization**

If you selected 'Other', please specify:

Submitted on: **10/11/2022 1:53:00 PM**

**Michael Herbert**  
*London Ontario N6H 2Z8*

**Work Experience**

- Senior Investment Advisor**, London 2015 – present
- Manage a group of clients and assist them with their financial management needs
  - Services include tax planning, estate planning, retirement planning
- Branch Manager**, Cheapside & Adelaide #703, London 2012 - 2015
- Champions ranking in 2013
  - Personally referred over \$5.4MM to Wealth
  - Lead a team that referred over \$15MM to Wealth
  - Developed thirteen team members to promotions
- Group Manager**, Branch Information Centre, London 2011-2012
- Led seven team managers and over one hundred specialists
  - Implemented a new ranking system for specialists to better align with CEI
  - Worked with RSCE, product groups and regions to provide product knowledge gaps
- Branch Manager**, Wellington & Bradley #2860, London 2008-2011
- Champions ranking of 23<sup>rd</sup> in 2011
  - Developed two MCS's and three FSR's to other leadership roles
- Regional Sales Manager**, Money In, Georgian Trails, WOC & London 2006-2008
- Supported district DVP's to develop and implement money in plans
  - Influenced and coached managers and advisors to money in goals
  - Facilitated and conducted presentations to advisors and customers

**Volunteer Experience**

- United Way of London and Middlesex**, London 2001- present
- Member of the Agency Partnership and Investment Committee (2010 - present)
  - Past Board Member (2007 – 2008)
  - Past Allocations Committee Chair (2007 – 2009)
- Volunteer Instructor**, Gracie Barra Jiu Jitsu 2011 - 2019
- Assist teaching Brazilian Jiu Jitsu
  - Active in Martial Arts for over 25 years

**Education**

- Certified Financial Planner**, FP Canada 2020
- Wilfrid Laurier University**, Honours Bachelor of Arts, Economics and Business 1993
- Institute of Canadian Bankers**, Professional Financial Planner Designation 1996
- Institute of Canadian Bankers**, Canadian Securities Course 1995

References available on request