

# Biography of Dan McAllister

San Diego County Treasurer



Dan McAllister was elected San Diego County Treasurer-Tax Collector by nearly 60% in November 2002. In June 2006, he was re-elected to a second term by 100% of the vote. As San Diego County Treasurer-Tax Collector, he has shaped his office into a strong regional fiscal resource and taken a number of steps to make his office a catalyst for innovation, transparency and best practices.

He is responsible for investing and managing more than \$6.2 billion of public funds, which includes the San Diego County investment pool and other dedicated portfolios. His management of the County's investment pool has earned the highest credit quality rating (AAAf/S1) from Standard & Poor's.

McAllister also has a wide variety of public debt issuance experience. He serves as paying agent for 99 school district general obligation (GO) bond issues, as well as assists all 42 public school districts within San Diego County with their bond transactions. As an essential member of the County's Debt Advisory Committee, he participates in the oversight of all San Diego County related debt issuances including the County's GOs, pension obligation bonds, tobacco securitization bonds, and certificates of participation. The County's current outstanding debt portfolio size is approximately \$1.6 billion.

Under his leadership, the number of San Diego County Pool participants has increased as a direct result of his outreach efforts. He has led numerous forums and workshops covering debt, investment and public finance. Additionally, his innovative Community Banking Initiative has provided strong yields to San Diego County Investment Pool participants while also providing capital for local economic expansion. For the past four and one half years, McAllister has served as a Board Trustee for the San Diego County Employees Retirement Association ("SDCERA"), an \$8.1 billion public employee pension fund. Under his leadership as the Board Chair from May 2003 to June 2005, SDCERA recorded strong investment returns and was recognized as one of the best performing pension funds in its peer group nationwide.

McAllister is also responsible for collecting nearly \$4 billion dollars in San Diego County property taxes each year. His efforts to streamline the tax collection process, implement cost-effective technologies, and cross-train customer service staff have resulted in net cost savings, improved customer service, and greater financial controls over County funds.

Prior to his election, he was a successful and respected financial consultant and investment broker with a major national brokerage firm. He recently completed a six-year term on the Board of Directors of the San Diego Convention Center Corporation, the agency that operates the region's major convention facility. During his tenure on the Board, the Convention Center doubled in size and increased its annual revenues significantly. McAllister served as Board Chair and Treasurer.

McAllister contributes considerable time and resources to community service, such as serving as Chair of the San Diego Unified School District's Special Audit and Finance Committee and participating as a member of the Boards of Directors of the Jackie Robinson YMCA and Big Brothers Big Sisters of San Diego County. He also serves as a member of the President's Council on Diversity and Equity at San Diego State University.

McAllister holds a BA from California State University Fresno, a MBA from United States International University, and has completed executive educational programs in portfolio concepts and management at Stanford University and at the University of Pennsylvania's Wharton School.