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Phil LeVota
Jackson County Executive

EXECUTIVE ORDER NO. 26-14

TO: MEMBERS OF THE LEGISLATURE
CLERK OF THE LEGISLATURE

FROM: PHIL LEVOTA
COUNTY EXECUTIVE

DATE: MARCH 11, 2026

RE: REAPPOINTMENT TO THE PENSION PLAN BOARD OF TRUSTEES

I hereby make the following reappointment to the Pension Plan Board of Trustees:

B. Stephen Gillis is hereby reappointed to a new term set to expire 3/31/2030. Mr. Gillis' resume is attached.

3-11-26
Date



Phil LeVota
County Executive

B. STEPHEN GILLIS

638 West 68th Terrace • Kansas City, Missouri 64113 • Residence: (816) 333-5183 • Wireless: (816) 898-1672
Email: bsglls@aol.com

PROFESSIONAL SUMMARY: Recognized as expert trust examiner with solid record in managing, planning, and conducting trust examinations throughout the state of Missouri. Diligently and professionally coordinates examination, periodic visits, and investigation of consumer complaints with other states and federal agencies in a timely and accurate manner. Excellent communicator with superior soft skills who is able to talk with a diverse audience and explain the trust process with clarity, understanding, and expertise.

MAJOR AREAS OF EXPERTISE

PERSONAL TRUST OFFICER: Facilitate and foster relationships by providing exemplary account administration and service to sophisticated high-net worth trust clients, their beneficiaries, and advisors. Administers fiduciary activities and compliance with laws, regulations, and established policies and procedures. Analyzes and interprets legal instruments to determine responsibilities of the trust department so all parties comprehend responsibilities, boundaries and roles.

COMPLIANCE OFFICER: Reviews state and federal regulatory compliance-related operating policies and procedures. Assists regulatory agencies with the compliance oversight in a concise manner. Supports the development of appropriate action plans and implements them for project success.

SPECIAL SKILLS AND ABILITIES

<ul style="list-style-type: none">• Resourceful• Innovative• Organized• Personable• Soft Skills• Planner	<ul style="list-style-type: none">• Educator of Trusts• Diverse Financial Knowledge Base• Strategic Thinker• Relationship Builder• Team Player	<ul style="list-style-type: none">• Strong Communicator• Reporting• Independent Trustee• Partnership Facilitator• Mentor• Project Management
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EXPERIENCE

AHM Financial Group, Saint Louis, Missouri

Independent Solicitor, 2012 to 2015

Contact clients such as trust departments or trust companies and serve as education and marketing liaison to introduce our investment staff to their trust management personnel staff

- Maintain friendly, and public relations demeanor when informing potential clients about the various extensive services and insurance products, for home, health and business
- Serve as valuable team member to the trust staff to share added values and services with new and existing clients in a professional manner

Jackson County Pension Plan Board of Trustees, Jackson County, Missouri

Independent Trustee May 2015 to Present

- Serve as objective and loyal trustee who is committed to giving sound judgment and advise on behalf of Jackson County employees, elected officials, and managers
- Expert in trusts and financial planning who is dedicated to serving the pension members to the fullest of professional capacity because of dedication to the purpose of the pension's goals and objectives

- Highly honored position and voted in by elected officials who entrust the leadership, expertise and overall professionalism based on 30 plus years of experience
- Elected Vice Chairman 2025
- Elected Chairman 2026

State of Missouri, Division of Finance, Kansas City, Missouri

Supervisory Trust Examiner, 1989 to 2012

- Responsible for the delivery of wealth management solutions to state chartered banks with trust departments and independent trust companies ranging from community banks with assets of \$2 million to institutions with assets of \$90 billion
- Supervise an assigned staff and coordinate examination reviews with federal regulatory agencies, and prepare written reports that are accurate
- Coordinate and conduct meetings between senior management and board of directors to communicate examination findings, compliance recommendations, and action plans
- Provide professional development training and performance feedback to novice and expert examiners task with field assignments
- Evaluate operational, legal, and reputational risks arising from fiduciary activities and corresponding risks management strategies to mitigate risks
- Established examination protocols with the Federal Reserve, the FDIC and the State of Missouri to provide increased personnel necessary for the examination of trust departments and trust companies
- This system allowed all three agencies to act as one providing a clear-cut message to management regarding examination findings

These scheduling systems placed the Federal Reserve, the FDIC and the State of Missouri on annual scheduled timeline so financial institutions knew in advance of their upcoming examinations

- Used perks, bonuses, examination scheduling, and continuing education, to foster employee retention and maintain morale

State of Missouri, Division of Finance, Kansas City, Missouri

Trust Examiner 1983-1989

- Led the on-site monitoring review and investigation process of charter applications for free-standing trust companies with assets totaling over \$7.5 billion
- Coordinated the first multi-state examinations of a fiduciary institution with multi location and/or offices in multiple states
- Planned and participated with other state agencies, the Federal Reserve Bank of Kansas City, Boston and New York in the examinations of the AG Edwards Trust Company; Mercantile Bank, Boatmen's Trust Company, State Street Bank and Trust, and the Bank of New York
- Streamlined examination process by developing relationships with federal regulatory organizations which double down examination resources and provided commonality of regulatory oversight and monitoring

State of Missouri, Division of Finance, Kansas City, Missouri

Assistant Trust Examiner, 1981 to 1983

- Served as the assistant trust examiner and point of contact assisted by the Department of Labor and FBI to identify fraudulent practices

- Developed reputation of trust and positive influence with trust vendors, regulatory agencies, and practicing attorney's to establish a repository of knowledge/standardization throughout the industry
- Researched critical information and gained reputation as an expert in The Uniform Principal and Income Act, The Uniform Prudent Investor Act, and Uniform Trust Codes

EDUCATION

University of Missouri, Columbia, Missouri, **Bachelor of Science in Finance**

Missouri Valley College, Marshall, Missouri, **Bachelor of Science in Economics**

Wentworth Military Academy, Lexington, Missouri, **Associates of Arts in Business**

CONTINUED PROFESSIONAL DEVELOPMENT

Missouri Association of Public Employees Retirement Systems (MAPERS) 2015 – Gained required legal mandate to receive nine hours of continuing education in pension and asset administration

UMKC Employee Benefits Seminars, 1981 to Present

FFIEC Asset Management Forum, 1981 to Present

MOKAN Trust Conference Guest Speaker regarding Regulatory Issues, 1981 to Present

Northwestern University, Evanston, Illinois, National Graduate Trust School

UNITED STATES MILITARY

Lieutenant United States Army Air Defense

FINANCIAL TOPIC SPEAKING ENGAGEMENTS

MOKAN Trust Conference

Missouri Valley College, Marshall, Missouri

University of Missouri, Columbia, Missouri

COMMUNITY LEADERSHIP

Uplift Volunteer

Knights of Columbus Fourth Degree Member

Sons of the Revolution Former Chapter President

Boys Scouts of America Member Eagle Scout Board of Review Team

Member: Delta-Tau-Delta Social Fraternity University of Missouri, Columbia

Member: Delta-Sigma-Pi Business Fraternity University of Missouri, Columbia