

**From:** [Thrillshare](#)  
**To:** [Joan Taylor](#)  
**Subject:** Online Advisory Board Application - new submission  
**Date:** Wednesday, August 6, 2025 4:20:03 PM  
**Attachments:** [080625 Online Advisory Board Application.csv](#)  
[DanielKastholm CV 08.06.2025.pdf](#)

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Hey jtaylor@cityofmarcoisland.com,

**Online Advisory Board Application** in [City of Marco Island](#) has received a new submission. You can view the submission below and download the copy attached to this email.

[View in Thrillshare](#)

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**Date of Application:** 2025-08-06 4:00 PM -0400

**First Name:** Daniel

**Last Name:** Kastholm

**Middle Name:** R

**Number and Street:** 680 Kendall Dr.

**Apt. Number :**

**City:** Marco Island

**State:** Florida

**Zip:** 34145

**Home:**

**Cell:** (630) 808-8624

**Business:**

**Email Address:** dkastholm@comcast.net

**Board or Committee:** Audit Advisory Committee

**How long have you lived on Marco Island?:** 5-10 Years

**Are you a year-round resident? :** Yes

**Are you a qualified elector of the City? :** Yes

**Have you ever been convicted or found guilty of a criminal offense (any level felony or first degree misdemeanor only)? :** No

**Would you (or any organizations with which you are affiliated) potentially benefit on a personal level from decisions or recommendations made by this board? :** No

**Do you currently hold public office? :** No

**Do you now serve, or have you ever served on a Collier County or City of Marco Island board or committee? :** No

**Please list your community activities and positions held (Example: Civic clubs, neighborhood associations, etc.): :**

**Why do you want to serve on a committee? :** It is a good opportunity to give back to my home Marco Island and I have the experience to add value to the committee.

**What issues do you think should be addressed by this committee?:** Provide oversight of financial reporting, risk management, internal controls, external auditors and governance and compliance.

**Resume:** DanielKastholm\_CV\_08.06.2025.pdf

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50 Bald Eagle Drive

# Daniel R Kastholm, CFA

*Marco Island, Florida*

Seasoned corporate finance professional with substantial experience in credit markets and fixed income securities issued by corporations domiciled in the U.S. and Latin America. Possess a deep understanding of accounting and finance with emphasis on debt capital markets, portfolio management, sovereign and corporate credit risk and ratings. Experience includes heading a large and growing division within Fitch Ratings, managing a large staff of fixed income analysts, and fostering relationships with sophisticated investors, c-suite executives, debt capital market originators and media.

## **Experience**

### **Adjunct Professor, Finance Department**

*Florida Gulf Coast University  
Fort Myers, FL*

*June 2024 - Present*

Adjunct faculty member instructing upper class students in corporate finance. Concepts covered include accounting, financial ratio analysis, working capital management, time value of money, bond and stock valuation, portfolio returns, capital budgeting, weighted average cost of capital and foreign exchange.

Actively promotes critical thinking and reasoning skills by applying key learning concepts to real world scenarios through case studies and examples. Efforts to promote an enhanced learning environment by encouraging participation and sound decision making.

### **Managing Director and Regional Group Head, Latin America**

*Fitch Ratings  
Chicago, IL*

*Jun 1994 - Jan 2022*

Senior executive and Latin America Regional Group Head in Fitch Ratings' corporate finance group. A high performing leader that fosters a culture of positive attitudes, high expectations, and successful performance through a results-oriented management style.

Managed a regional division and was responsible for all analytical aspects of the group's activities including credit ratings, fixed income research, and institutional investor outreach. The portfolio consisted of more than 600 corporate fixed income issuers which was covered by a team of analysts located in nine offices in six countries. Additional priorities included ratings, accuracy and performance, ratings research and chairing Fitch's corporate rating committees.

Led the team by providing analytical thought leadership and credit insights as well as providing strategic direction in the credit rating process and generation of credit research. Ensured full compliance with internal policies and regulations. Collaborated with other regional leaders and compliance teams on product development and rating criteria. Developed and engaged staff through various training and team building events, internal presentations and regular communication.

# Daniel R Kastholm, CFA

*Marco Island, Florida*

Created and maintained strong analytical relationships with key institutional investors, debt capital market bankers, various media outlets and corporate issuers which established Fitch as a market leader. Drove outreach initiatives with various sophisticated institutional investors and other market participants through speaking at conference events and direct calling.

**Skills:** Leadership · Team Building · Fixed-Income Investing · Capital Markets · Credit Analysis · Corporate Finance · Emerging Markets · Leveraged Finance

## **Chairman, Board of Directors**

*CFA Society Chicago  
Chicago, IL*

*Aug 2016 – Aug 2021*

Held various officer roles on CFA Society Chicago's board of directors providing oversight and strategic direction to society management to drive superior member value through content creation, enhanced content delivery and increased member engagement.

As Chairman, led board meetings to discuss all aspects of the Society's operations. Drove the creation of a new 5-year strategic plan to provide direction and set goals for society management. The plan introduced additional KPI's and measurement tools to track progress to meet long term goals. Established and served as Chair of the CEO search committee and interviewed/selected executive search firms, interviewed candidates, and presented the final CEO candidate to the board for approval.

As Immediate Past Chair, chaired the Governance and Nominating committee. Responsible for vetting potential board members, conducting interviews, reaching committee consensus and presenting the new slate of Board members for Board approval. Reviewed and updated the society's bylaws. Established a forum for various advisory/volunteer groups to better coordinate Society's content creation and delivery as well as to improve information flow between the board and the advisory groups.

Prior as Director, served on the audit committee and provided oversight for the Board of Directors to ensure the integrity of the financial reporting, audit process and internal controls. Served as ex officio on virtually all other Board committees as an officer.

**Skills:** Board of Directors · Board Governance · Corporate Governance · Business Strategy · Program Development · Leadership · Financial Oversight

## **Advisor**

*Handle With Care  
Elmhurst, IL*

*Jun 2008 – Jun 2017*

Advised and assisted in the start-up and development of a growing in-home care business including set-up of various operating functions such as accounting, legal, marketing, payroll and website development. Periodically assisted with growth projects including upgrading of information systems, office relocation and implementation of new employee benefit programs. Advised and negotiated the successful sale of the business to a national home healthcare provider as part their acquisition strategy.

# Daniel R Kastholm, CFA

*Marco Island, Florida*

## **Vice President/Associate**

*LaSalle/StanChart/Security Pacific Business Credit  
Chicago, IL*

*Apr 1988 - Jun 1994*

Originated, underwrote and closed leveraged finance transactions including acquisition financings, dividend recaps, and turnaround financing for middle market companies in the U.S.

**Skills:** Asset-Based Lending · Leveraged Lending · Loan Origination · Credit Analysis · Financial Modeling

## **Volunteer**

Currently serve on Island Country Club's finance committee providing financial oversight, such as budget review and recommendation, financial statement review and performance tracking, audit and tax review for the benefit of the Board of Directors.

Additionally support various local charities and non-profits including Our Daily Bread Food Pantry, Marco Island Police Foundation, Marco Island Center for the Arts, Marco Island Historical Society, Island Country Club Foundation and Marco Dementia Respite.

## **Education**

Masters of Business Administration, University of Illinois Urbana-Champaign, 1987

Bachelor of Science, Agriculture, University of Illinois Urbana-Champaign, 1985

Chartered Financial Analyst, CFA Institute, 1992