

# FOIA Marker

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Records Management, White House Office of

Alpha Files - PE002 (Employment - Appointments)

Stack:	Row:	Sect.:	Shelf:	Pos.:	FRC ID:	Location or Hollinger ID:	NARA Number:	OA Number:
W	13	13	3	1	2239	15174	3635	3770

Folder Title:

642546 Katja Bullock Folder 1 [3]

# Withdrawn/Redacted Material

## The George W. Bush Library

DOCUMENT NO.	FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
001	Information Sheet	[Candidate Information - R.N. - with attachments]	26	01/04/2001	P2; P5; P6/b6;
002	Resume	[Resume - A.N. - with attachments]	9	03/27/2001	P2; P5; P6/b6;
003	Information Sheet	[Candidate Information - D.N. - with attachments]	6	10/03/2001	P2; P5; P6/b6;
004	Resume	[Resume - J.N. - with attachments]	7	N.D.	P2; P5; P6/b6;
005	Resume	[Resume - S.N. - with attachments]	3	N.D.	P2; P5; P6/b6;
006	Information Sheet	[Candidate Information - T.N. - with attachments]	82	02/06/2001	P2; P5; P6/b6;
007	Resume	[Resume - D.N. - with attachments]	10	N.D.	P2; P5; P6/b6;
008	Resume	Heidi Suzanne Nelson [page 1]	1	N.D.	P6/b6;

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2239

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Presidential Records Act - [44 U.S.C. 2204(a)]

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PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

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Records Not Subject to FOIA

Court Sealed - The document is withheld under a court seal and is not subject to the Freedom of Information Act.

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DOCUMENT NO.	FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
009	Email	Treasury Transition Resumes - To: Kim Nickles - From: Susan Bernabucci	1	01/14/2001	P2; P5; P6/b6;
010	Resume	Heidi Suzanne Nelson [page 1]	1	N.D.	P6/b6;

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**HEIDI SUZANNE NELSON**

(b)(6)  
heidi.nelson@bushchenev.gov (b)(6) (cell)

**Education**

- 1998 – 2000 **HARVARD BUSINESS SCHOOL** **BOSTON, MA**  
Masters in Business Administration, June, 2000.  
Research Associate to member of finance faculty. Performed market research on economic factors impacting various asset classes; compared aggregate indicators to empirical data.  
Member of International Development Club, Finance Club, and Ibero-Americana Club.
- 1994 – 1995 **UNIVERSITE LIBRE DE BRUXELLES, SOLVAY SCHOOL** **BRUSSELS, BELGIUM**  
Rotary International Ambassadorial Scholar. Master of Arts Degree, European Studies, *Honors*.
- 1990 – 1994 **CLAREMONT MCKENNA COLLEGE** **CLAREMONT, CA**  
Bachelors of Arts in Economics and International Relations, *magna cum laude*, 1994. Phi Beta Kappa.  
Economics Faculty honor for best senior thesis in Economics. Lowe Institute of Political Economy Scholar.
- 1992-1994  
President of Claremont McKenna College Republicans.  
California Youth Delegate, 1992 Republican National Convention, Houston, TX.

**Experience**

Jun – Nov  
2000

**BUSH-CHENEY 2000**

*Policy Staff – focused on economic policy*

**Tax Policy**

- Applied the President-elect's tax plan to American families who exemplified its merits. Performed quantitative analysis, drafted memos to the President-elect, answered press questions about the plan and its practical implications.
- Drafted side-by-side analysis of President-elect's and Gore's tax plans; drafted the tax policy one-pager for the Bush-Cheney website.
- Wrote talking points and performed quantitative analysis for media surrogates.
- Helped draft debate responses to tax policy questions for the presidential debates.

**General Policy**

- Developed outline of pension policy for the campaign: conducted calls with Capitol Hill, drafted questionnaire for pension interest group, prepared memo to President-elect on pending legislation.
- Helped write *W. Stands for Women* book, produced for the President-elect's campaign outreach to women. Incorporated Social Security, Tax, Education, Family, and Healthcare policy issues.
- Drafted (as part of a team) *Renewing America's Purpose*.
- Helped negotiate Republican Party Platform on Government Reform, Republican Convention, 2000.

Nov-Dec  
2000

**FLORIDA RECOUNT TEAM**

*Policy Staff- assisted Political operation*

Helped design and implement the quantitative strategy during the recount in Miami-Dade County; helped tally ballot counts on spreadsheets; developed model to perform summary statistics on voting data.

Dec –Jan  
2001

**BUSH-CHENEY TRANSITION**

*Department of Treasury Coordinator*

Drafted questions for meetings with incumbent Treasury officials; participated in interviews; set up and participated in conference calls with Chief Economists at the major private sector banks; helped draft final briefing document for the incoming Treasury Secretary (focusing on International Affairs).

Summer  
1999

**BANCBOSTON ROBERTSON STEPHENS & CO.**

**SAN FRANCISCO, CA**

*Corporate Finance Senior Associate, eCommerce Services Group*

Helped develop IPO valuation models, positioned strategy and risks for investors, participated in financial and management due diligence, helped client prepare for and participated in roadshow presentation.

Apr – Sept  
1998

**UNITED STATES SENATE**

**WASHINGTON, DC**

**Assistant Economic Advisor to Senator Ashcroft**

Helped research, design, and negotiate economic policy.

- Recommended changes in marginal tax rates, national debt paydown schedule, budget surplus, and government spending.
- Quantified recommendations to determine what was economically feasible yet politically saleable.
- Conducted focus meetings with other Senators and lobbyists to develop consensus on the plan.

1995 – 1998

**J.P. MORGAN AND CO., INC.**

**NEW YORK, NY**

**Investment Banking, Associate**

Developed valuation analyses, performed due diligence, prepared offering memoranda, and analyzed strategic issues for companies in various industries.

***Latin America Mergers and Acquisitions***

- *Venezuelan consumer products advisory*: advised on expansion strategy in Latin America.
- *Mexican privatization*: advised Mexican government on privatization strategy for state-owned petrochemical plants.
- *Advisory for US multinational*: built model of stock merger, advised on international strategy.

***Cross-Border Structured Finance***

- *Argentine forward asset sale*: led the execution of a \$400m forward sale of oil for largest company in Argentina, participated in negotiations to obtain a rating on the bonds.
- *Brazilian forward asset sale*: wrote sell book to investors, helped build cashflow model for \$200m.
- *South African private placement*: sold \$400m of privately placed debt to institutional investors.

Summer  
1992

**UNITED STATES HOUSE OF REPRESENTATIVES**

**WASHINGTON, DC**

House Republican Conference, Conference Chair, Rep. Jerry Lewis, *Intern*.

- Assisted in planning weekly House Republican meeting agenda.
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Conversant in Spanish, French. Completed Paris Marathon.

# Withdrawal Marker

## The George W. Bush Library

FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Email	Treasury Transition Resumes - To: Kim Nickles - From: Susan Bernabucci	1	01/14/2001	P2; P5; P6/b6;

**This marker identifies the original location of the withdrawn item listed above.  
For a complete list of items withdrawn from this folder, see the  
Withdrawal/Redaction Sheet at the front of the folder.**

**COLLECTION:**

Records Management, White House Office of

**SERIES:**

Alpha Files - PE002 (Employment - Appointments)

**FOLDER TITLE:**

642546 Katja Bullock Folder 1 [3]

**FRC ID:**

2239

**OA Num.:**

3770

**NARA Num.:**

3635

**FOIA IDs and Segments:**

2015-0308-F

### RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

- P1 National Security Classified Information [(a)(1) of the PRA]
- P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
- P3 Release would violate a Federal statute [(a)(3) of the PRA]
- P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
- P5 Release would disclose confidential advise between the President and his advisors, or between such advisors [(a)(5) of the PRA]
- P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

**Deed of Gift Restrictions**

- A. Closed by Executive Order 13526 governing access to national security information.
- B. Closed by statute or by the agency which originated the document.
- C. Closed in accordance with restrictions contained in donor's deed of gift.

Freedom of Information Act - [5 U.S.C. 552(b)]

- b(1) National security classified information [(b)(1) of the FOIA]
- b(2) Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]
- b(3) Release would violate a Federal statute [(b)(3) of the FOIA]
- b(4) Release would disclose trade secrets or confidential or financial information [(b)(4) of the FOIA]
- b(6) Release would constitute a clearly unwarranted invasion of personal privacy [(b)(6) of the FOIA]
- b(7) Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]
- b(8) Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
- b(9) Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]

**HEIDI SUZANNE NELSON**

(b)(6)  
heidi.nelson@bushchenev.gov (b)(6) (cell)

**Education**

- 1998 – 2000 **HARVARD BUSINESS SCHOOL** **BOSTON, MA**  
Masters in Business Administration, June, 2000.  
Research Associate to member of finance faculty. Performed market research on economic factors impacting various asset classes; compared aggregate indicators to empirical data.  
Member of International Development Club, Finance Club, and Ibero-Americana Club.
- 1994 – 1995 **UNIVERSITE LIBRE DE BRUXELLES, SOLVAY SCHOOL** **BRUSSELS, BELGIUM**  
Rotary International Ambassadorial Scholar. Master of Arts Degree, European Studies, *Honors*.
- 1990 – 1994 **CLAREMONT MCKENNA COLLEGE** **CLAREMONT, CA**  
Bachelors of Arts in Economics and International Relations, *magna cum laude*, 1994. Phi Beta Kappa.  
Economics Faculty honor for best senior thesis in Economics. Lowe Institute of Political Economy Scholar.
- 1992-1994  
President of Claremont McKenna College Republicans.  
California Youth Delegate, 1992 Republican National Convention, Houston, TX.

**Experience**

Jun – Nov  
2000

**BUSH-CHENEY 2000**  
*Policy Staff – focused on economic policy*

**Tax Policy**

- Applied the President-elect's tax plan to American families who exemplified its merits. Performed quantitative analysis, drafted memos to the President-elect, answered press questions about the plan and its practical implications.
- Drafted side-by-side analysis of President-elect's and Gore's tax plans; drafted the tax policy one-pager for the Bush-Cheney website.
- Wrote talking points and performed quantitative analysis for media surrogates.
- Helped draft debate responses to tax policy questions for the presidential debates.

**General Policy**

- Developed outline of pension policy for the campaign: conducted calls with Capitol Hill, drafted questionnaire for pension interest group, prepared memo to President-elect on pending legislation.
- Helped write *W. Stands for Women* book, produced for the President-elect's campaign outreach to women. Incorporated Social Security, Tax, Education, Family, and Healthcare policy issues.
- Drafted (as part of a team) *Renewing America's Purpose*.
- Helped negotiate Republican Party Platform on Government Reform, Republican Convention, 2000.

Nov-Dec  
2000

**FLORIDA RECOUNT TEAM**  
*Policy Staff- assisted Political operation*

Helped design and implement the quantitative strategy during the recount in Miami-Dade County; helped tally ballot counts on spreadsheets; developed model to perform summary statistics on voting data.

Dec +Jan  
2001

**BUSH-CHENEY TRANSITION**  
*Department of Treasury Coordinator*

Drafted questions for meetings with incumbent Treasury officials; participated in interviews; set up and participated in conference calls with Chief Economists at the major private sector banks; helped draft final briefing document for the incoming Treasury Secretary (focusing on International Affairs).

Summer  
1999

**BANCBOSTON ROBERTSON STEPHENS & CO.** **SAN FRANCISCO, CA**  
*Corporate Finance Senior Associate, eCommerce Services Group*

Helped develop IPO valuation models, positioned strategy and risks for investors, participated in financial and management due diligence, helped client prepare for and participated in roadshow presentation.

Apr – Sept  
1998

**UNITED STATES SENATE**

**WASHINGTON, DC**

**Assistant Economic Advisor to Senator Ashcroft**

Helped research, design, and negotiate economic policy.

- Recommended changes in marginal tax rates, national debt paydown schedule, budget surplus, and government spending.
- Quantified recommendations to determine what was economically feasible yet politically saleable.
- Conducted focus meetings with other Senators and lobbyists to develop consensus on the plan.

1995 – 1998

**J.P. MORGAN AND CO., INC.**

**NEW YORK, NY**

**Investment Banking, Associate**

Developed valuation analyses, performed due diligence, prepared offering memoranda, and analyzed strategic issues for companies in various industries.

***Latin America Mergers and Acquisitions***

- *Venezuelan consumer products advisory*: advised on expansion strategy in Latin America.
- *Mexican privatization*: advised Mexican government on privatization strategy for state-owned petrochemical plants.
- *Advisory for US multinational*: built model of stock merger, advised on international strategy.

***Cross-Border Structured Finance***

- *Argentine forward asset sale*: led the execution of a \$400m forward sale of oil for largest company in Argentina, participated in negotiations to obtain a rating on the bonds.
- *Brazilian forward asset sale*: wrote sell book to investors, helped build cashflow model for \$200m.
- *South African private placement*: sold \$400m of privately placed debt to institutional investors.

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1992

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