

# Jim Simon

JA: Good morning, Jim. Thank you for meeting with me. Please tell me where you were born and grew up.

JS: I was born in Milwaukee, Wisconsin and lived there till I was 18 years old.

JA: Tell me about your family background

JS: I have an older sister Susie, who is a housewife and has two boys.

My father was a traveling salesman, and my mother was a housewife.

JA: Are you married?

JS: I have been married for 31 years to Jill. But I have known Jill for 40 years, as we lived together for 7 years before getting married. Jill's sister called it "the seven year hitch".

JA: How did you meet Jill?

JS: I was transferred to Westport, Connecticut by my employer and met Jill through mutual friends.

JA: I know that Jill is an accomplished artist. I have seen and love her artwork.

JS: Jill is very talented and has a studio in the Naples Art District. Few people know that Jill produced TV commercials. And she was a production coordinator of feature films such as: "The Godfather"; "French Connection" and others.

JA: Back to you. Did you attend college?

JS: I graduated from the University of Wisconsin, majoring in psychology and advertising. After graduating, I joined a market research company where I stayed for 7 years. It was with a firm that did advertising and new-product testing. We had 7 test markets in the US.

In 1992 I joined a startup, which was sold in 2000. In 2002, I joined another startup, and it was sold in 2006.

In 2007, two partners and I started our own behavioral data analytics company. In 2014, we merged with a Colorado company and then, in 2015, sold the combined company to ORACLE. You could say I've been a "bum" since 2015.

JA: Congratulations are in order. Sounds like you did well at an early age. Could you explain the nature of the work your last firm did.

JS: Our firm employed some 500 people, many math and statistics experts. I'll try to explain with the following example the type of work we did.

Imagine a company like Viking Cruise Lines came to us with a list of 10,000 of their customers. We would find all the common characteristics of these customers in terms of their purchase behavior. We would then do "look alike modeling," finding other households that had the same common characteristics. Viking would then send targeted ads to these potential customers.

JA: How long have you resided in Naples?

JS: Jill and I have been visiting Naples since the early 80's, coming to see friends. After retiring, we bought our home here and became FL residents in 2016.

JA: It looks like you still had the entrepreneur spirit. Tell me about your newest venture.

JS: Together with one of my old partners, we created "TaxBird," which was launched in 2017. TaxBird is an app that allows snowbirds to automatically track the number of days they spend in their 'summer' state. Most states have a maximum number of days you can reside there during the year without having to

pay state income or estate taxes. TaxBird also is useful for athletes and entertainers who travel extensively and have to pay taxes in every state in which they work.

JA: It's interesting to note that I was using this app long before I met you. And here in Naples I have met so many people who are using it. It really is a great app. Let's discuss your participation with MCA.

JS: I am presently serving my second term on the board and responsible for the following:

- Program Committee - coordinator of the MCA Speaker Series
- Technical support for the Men's Health and Financial Health Series
- Calendar scheduling for MCA events at the Nina Iser building.

I also bike with the MCA group, attend lectures, and I am active with the new wine tasting group.

JA: Talking about wine tasting. I heard that you are quite an expert.

JS: Starting in college I was buying and drinking wine and today I have over 1,000 bottles between Naples and Westport, Connecticut where Jill and I spend the summer. My wine collection is not for investment. Rather, it's for drinking and sharing with friends.

JA: Do you have a favorite wine?

JS: I would probably have to say that it is California Cabernet, but lately we've been drinking a lot of Pinot Noirs (from CA, OR and WA).

JA: Do you and Jill eat out often?

JS: We both love to cook and use our "Big Green Egg" quite a bit. Our favorite Naples restaurants are BrickTops and Rebecca's.

JA: What are some of the non-MCA activities you partake in

JS: I play tennis 3-4 times a week. I also go to the gym several times a week.

Recently I have taken up magic – mostly cards and coins. Back in high school I was part of a troupe that performed stage magic.

Travel has always been a passion; Jill and I have taken over a dozen biking trips in Africa, Asia, and Europe. Two of our favorite places are Italy and St. Barts, which we have visited quite a few times. We haven't been to Israel, but it's on my bucket list.

JA: Jim, you are a fascinating individual who has accomplished so many things. Your contributions to the MCA are seen and appreciated by everyone. On a personal basis, I would strongly hope that you present to the MCA a lesson in wine appreciation and tasting. I would also expect a future magic performance.