

ATTACHMENT 3

APPLICATIONS FOR THE FINANCE ADVISORY COMMITTEE

***To submit form via email, please save application, fill in, and send to cityclerk@costamesaca.gov.

City of Costa Mesa Application for Committee Appointment

All information on this page only, is considered public information and will be released to the public, including being posted on the City's website.

Name: Jeff Arthur

Indicate the name of the Committee you are interested in serving on:
Finance Advisory Committee



City of Costa Mesa
77 Fair Drive, Costa Mesa, CA 92626

1. Indicate why you wish to serve on this Committee. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee. A resume (optional) may be attached.
(Note: All information contained on the resume is public information, will be distributed to the public and posted on the City's website).

I would like to help Costa Mesa build consensus and find the best possible outcome for the city of Costa Mesa, its employees and residents. I am currently serving as the Chair of the Pension Oversight Committee and am a member of the Finance Advisory Committee.

I am a Finance professional who succeeded in many industries in a variety of roles: aerospace, engineering, manufacturing, distribution, environmental, television, and education; as an enrolled agent, financial analyst, accountant, manager, controller and Chief Financial Officer.

I have worked as a sole proprietor, for government contractors, public companies, private companies, international companies, small companies, Fortune 100 companies, a government agency, not-for-profit 501(c)3, and am knowledgeable in the requisite tax, FASB, GASB and fund accounting practices, regulations and laws.

I look forward to continuing to help Costa Mesa by serving on the Finance Advisory Committee.

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16 FEB -5 AM 11:11
CITY OF COSTA MESA
BY *SMH*

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City of Costa Mesa Application for Committee Appointment

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Name: James R. Fisler

Indicate the name of the Committee you are interested in serving on:

Finance Advisory Committee



City of Costa Mesa
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I am a current member of the committee and wish to continue to be on the committee.

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16 FEB 18 PM 1:48
CITY OF COSTA MESA
BY Matthew

City of Costa Mesa Application for Committee/Board Appointment

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Name: Howard Hull

Indicate the name of the Committee/Board you are interested in serving on:
Finance Advisory Committee



City of Costa Mesa
77 Fair Drive, Costa Mesa, CA 92626

1. Indicate why you wish to serve on this Committee/Board. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Board. A resume (optional) may be attached. (Note: All information contained on the resume is public information, will be distributed to the public and posted on the City's website).

As a member of the community, I believe that it is important to participate in the support of the City in its functions of serving the residents that reside here in the City of Costa Mesa. We have many challenges in the near future with a slowing economy, coupled with near zero interest rates and the threat of Deflation on the horizon, the City will need to continue to look forward to operate in a more efficient manner.

My Background in Banking and finance for the last 30 plus years allows me to bring material and expertise to review and help listen to the proposals from staff and outside vendors. I participate in over six major economic/business/investment conferences annually. These are not only domestically themed, but are also international and provide a good geopolitical reference to the challenges facing Cities not only in the U.S., but across borders as well

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16 FEB 16 PM 2:30
CITY OF COSTA MESA
BY MTaylor

2. Contact Information:

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City of Costa Mesa Application for Committee Appointment

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Name: Robert Juneman

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Finance Advisory



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77 Fair Drive, Costa Mesa, CA 92626

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I currently serve as a member of the Finance Advisory Committee and would like to continue in that role. I also serve on the Pension Oversight Committee.

I have a background in financial services and feel I have the qualifications necessary to be of help to the city.

I also serve the community as a member of the Community Emergency Response Team (CERT), as well as being a member to the advisory committee for Hoag Hospital, Irvine.

Graduate UCLA 1952

U.S. Air Force 1952-1960 Rank of Captain

Morgan Stanley 1960-1997 served as a

Registered Representative,

Branch Manager,

Regional Director

Member, Board of Directors and Senior Management Group

During my career in the investment business I was a member of the Board, as well as being Chairman of the Securities Industry Association, Western Region, and I have served as an adjunct member of the New York Stock Exchange.

I also attended the Securities Industry Institute at the Wharton School, University of Pennsylvania.

I held the title of Certified Financial Planner.

I currently manage our family investment portfolio.

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16 JAN 28 PM 2:36
CITY OF COSTA MESA
BY *[Signature]*

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City of Costa Mesa Application for Committee Appointment

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Name: AL MELONE

Indicate the name of the Committee you are interested in serving on:

FINANCE ADVISORY COMMITTEE



City of Costa Mesa
77 Fair Drive, Costa Mesa, CA 92626

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I am a retired CPA, with an MBA in Finance, a fiscal conservative, presently on the Pension Oversight Committee.

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CITY CLERK
16 FEB 12 PM 3:40
CITY OF COSTA MESA
BY Matthew

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City of Costa Mesa Application for Committee Appointment

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Name: Tom Pollitt

Indicate the name of the Committee you are interested in serving on:
Finance



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I am currently on the finance committee and have not missed any of the meetings in the past two years which shows my interest in City finances. I am a small businessman and have my MBA as well as I worked for Citibank for 10 years.
Thank you for your consideration of my application.

RECEIVED
CITY CLERK
16 JAN 22 AM 7:16
CITY OF COSTA MESA
BY *Matthew Lee*

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City of Costa Mesa Application for Committee Appointment

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Name: RICHARD RIVA

Indicate the name of the Committee you are interested in serving on:
FINANCIAL ADVISORY COMMITTEE (FAC)



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77 Fair Drive, Costa Mesa, CA 92626

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I HAVE SERVED AS A VOTING MEMBER OF THIS COMMITTEE (FAC) FOR THE PAST TWO YEARS AND HAVE BEEN A RESIDENT OF COSTA MESA FOR OVER 25 YEARS. PROFESSIONALLY, I AM A FINANCIAL ADVISOR AND AN INVESTMENT PRINCIPAL AND CERTIFIED PRIVATE WEALTH ADVISOR(r)

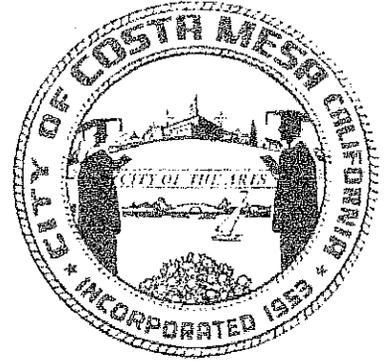
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16 FEB -3 PM 12: 28
CITY OF COSTA MESA
BY *Matthew Lee*

City of Costa Mesa Application for Committee Appointment

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Name: Ralph Taboada

Indicate the name of the Committee you are interested in serving on:
Finance Advisory Committee



City of Costa Mesa
77 Fair Drive, Costa Mesa, CA 92626

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I am applying for a position on the Finance Advisory Committee (FAC).

I am a long time resident of Costa Mesa and am currently Chair of the Bikeway & Walkability Committee and Vice Chair of the Pension Oversight Committee. I am retired and have the time and interest in giving back to Costa Mesa. I believe I have served both committees well and proactively participate in both committees.

I currently attend most of the FAC meetings as a guest and regularly make comments. The Chair and other Committee members have mentioned to me their appreciation for my comments and some have also encouraged me to apply for the Committee.

There are several members on the Finance Committee who are also on the Pension Committee. By attending both committee meetings I see where being on both committees is beneficial and hope you feel the same.

I have an over 30 year career in accounting/finance and this has helped me on the Pension Committee and would also help on the FAC.

Some people talk and some people do. I believe I am a doer. I have demonstrated my desire to help Costa Mesa by taking the time and getting involved. I believe I can continue to help by becoming a member of the Finance Advisory Committee. I appreciate your support for this committee appointment.

Thank you:
Ralph Taboada

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City of Costa Mesa Application for Committee Appointment

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Name: Susan Tuchler

Indicate the name of the Committee you are interested in serving on:

Bikeway & Walkability or Cultural Arts or Historical Preservation or Financial Advisory or Housing & Public Service or Pension Oversight



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77 Fair Drive, Costa Mesa, CA 92626

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I have served on the following committees for the City of Santa Ana:

1. Environmental & Transportation Advisory Committee 2010-2011
2. Community Redevelopment & Housing Commission 2011-2015, also serving as committee chair for one year
3. The Personnel Board 2015

I was asked to apply for a seat on these committees at the request of Councilman Sal Tinajero. I enjoyed working on each committee and making contributions to improve the city. Unfortunately I had to resign from my position on The Personnel Board due to my relocation to the city of Costa Mesa last summer.

Since my relocation I have been following the city of Costa Mesa website. I would like the opportunity to serve on one of the committees listed above in the new city that I now proudly call my home! I feel that I possess the necessary qualifications to sit on any of the committees. You can decide where I can best be of service.

Attached is my resume. Please contact Councilman Tinajero at city hall in Santa Ana for a reference! I look forward to speaking with you.

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CITY CLERK
16 FEB -8 AM 7:50
CITY OF COSTA MESA
BY _____

Susan Tuchler

1289 Westreef Costa Mesa, CA 92627

949-246-5978 | stuchler@att.net

Efficient, precise, and resourceful professional with proven nonprofit expertise gained throughout 15 years of professional service in the public and private sectors. Extensive event planning and fundraising skills, raising million-dollar proceeds for nonprofit organizations and businesses. Well versed in contract negotiations, budget implementation, and developing, organizing, and directing events successfully. Areas of expertise include:

Project Management
Strategic Planning
Team Facilitation

Training & Development
Client Relations
Promotions

Budget Preparation
Writing & Research
Event Planning

NOTABLE ACCOMPLISHMENTS

- Raised over \$5 million for nonprofit organizations through successful campaigns.
- Acquired donated advertisement and editorial space in three major magazines to publicize events resulting in a 90% increase in event attendance.
- Captured an exclusive multimillion-dollar sales contract for a private business.
- Secured major retail shopping mall space to publicize a national awareness week for a nonprofit foundation resulting in 50% donation increase.
- Raised \$500K in four months for a congressional campaign.
- Obtained donated television time on local news programs to promote nonprofit organizations that increased membership by 85%.
- Established an Internet web directory for business and professional women which lead to 85% increased attendance at business and professional events.
- Devised and implemented a company's marketing and promotional events, successfully advertising a product that generated a 75% increase in sales.

PROFESSIONAL RESPONSIBILITIES

- Solicited major companies/corporations and wrote grants to obtain over \$100K in event sponsorships.
- Managed outreach efforts for fundraising campaigns through major and minor event programs, encompassing up to 1,000 attendees.
- Secured speakers and celebrities, organized travel arrangements, conceived and planned events for multiple nonprofit fundraising functions.
- Negotiated contracts and conducted budget planning for a foundation and a federation's various functions.
- Performed statistical analyses, devising abstracts for publications and presentations at national conferences.
- Developed comprehensive systems to streamline and automate the operations of a company, including a computerized network and comprehensive database.
- Managed all aspects of a company's properties including a 15,000 square foot home.
- Oversaw installation of \$500K landscape project, working with architects, structural engineers, general contractors and subcontractors to ensure timely, under budget completion of the project.

TECHNOLOGY TOOLS

- Advanced in Microsoft Office Suite
 - Advanced in Donor Database/Fundraising Programs (Gift Traq, Raiser's Edge)
 - Proficient in Social Networking (Facebook, LinkedIn, Twitter)
-

PROFESSIONAL EXPERIENCE

Council on Aging of Orange County Long Term Care Ombudsman	Santa Ana, CA 2015 – present
Personnel Board City of Santa Ana Commissioner	Santa Ana, CA 2015
Community Redevelopment & Housing Commission Commissioner	Santa Ana, CA 2011 – 2015
Committee To Re-Elect Loretta Sanchez Finance Director	Santa Ana, CA 2011 – 2012
Environmental & Transportation Advisory Committee Commissioner	Santa Ana, CA 2010 – 2011
Leaffer Corporation Estate Manager	Denver, CO 2006 – 2008
Crohn's & Colitis Foundation of America Executive Director	Denver, CO 2004 – 2005
Cystic Fibrosis Foundation Director of Special Events	Denver, CO 2002 – 2003
Allied Jewish Federation Campaign Manager	Denver, CO 2000 – 2002
Joslins Department Stores Business Manager	Littleton, CO 1995 – 1997
Medtronic Incorporated Technical Service Representative	Secaucus, NJ 1989 – 1992
Maimonides Medical Center Medical Research Analyst	Brooklyn, NY 1987 – 1989
J.C. Weidig M.D Surgical Assistant	Rockville, MD 1986 – 1987

EDUCATION

St. Georges University School of Medicine Masters in Medical Sciences	Grenada, West Indies 1982 – 1985
Creighton University Bachelor of Science, Biology	Omaha, Nebraska 1978 – 1982

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Name: Steve Young

Indicate the name of the Committee you are interested in serving on:
Financial Advisory



City of Costa Mesa
77 Fair Drive, Costa Mesa, CA 92626

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I am a resident of Costa Mesa along with my wife and 4 month old son so I have a vested interest in making sure the city maintains it's high standard. The financial oversight of any city is critical and, specifically in Costa Mesa, where there are a number of ongoing/future projects that will affect residents for years to come. I'm a First Vice President at CBRE where over the last 9 years I have represented small business owners, large corporations and major institutional groups in evaluating their real estate. This included providing financial analysis which was one resource I provided throughout the process. I also believe in giving back to my community.