

#30

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, March 02, 2022 2:32:52 PM  
**Last Modified:** Wednesday, March 02, 2022 2:47:51 PM  
**Time Spent:** 00:14:59  
**IP Address:** 98.189.127.108

---

Page 1

Q1

Full Name:

Randolph Benjamin Reynolds

Q2

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

**Parks, Arts and Community Services Commission  
(Districts 3)**

**Finance and Pension Advisory Committee,**

**Housing & Public Service Grants Committee**

Q3

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

As a homeowner and businessman in Costa Mesa I would like to give back through service to the community I am raising my family in. I have worked and continue to work as a CFO for OC real estate, construction, and logistics businesses by day. In my free time I have started a non-profit to support kids opportunities through sport, raising money through events and donating to applicants in need of support. I hold advanced degrees in both Business, MBA, and Organizational Leadership, MS.

If appointed to Parks, Arts, and Community Services Commission, I would love to share my experience to support creative fundraising, arts, learning, and recreation opportunities for the community.

If appointed to the Finance and Pension Advisory Committee, I could objectively apply my expertise to suggest prime opportunities to enhance financial outcomes meeting near, mid, and long term objectives.

Lastly, if appointed to the Housing & Public Service Grants Committee I could objectively suggest opportunities for improvement encouraging sustainable programs that meet public needs.

---

**Q4**

As a Committee/Commission member, what ideas or projects are of interest to you?

I am interested in addressing the homeless and housing challenges currently facing the city, encouraging more community participation in local services like recreation and arts, and helping the city maintain a sustainably solvent finance plan.

---

**Q5**

**Respondent skipped this question**

Optional Resume:

---

**Q6**

Contact Information:Note: This contact information will not be posted on the City's website or distributed to the public. However, this information is still subject to release pursuant to the California Public Records Act.

Name:

**Randolph Benjamin Reynolds**

Address:

City/Town:

ZIP/Postal Code:

Email Address:

Phone (cell):

---

**Q7**

Signature Required

**By checking this box and typing my name below, I am electronically signing my application.**

---

**Q8**

Full Name:

Randolph Benjamin Reynolds

---

#34

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 03, 2022 10:50:56 AM  
**Last Modified:** Thursday, March 03, 2022 10:59:58 AM  
**Time Spent:** 00:09:02  
**IP Address:** 99.87.198.212

---

Page 1

**Q1**

Full Name:

Felice Shiroma

---

**Q2**

**Finance and Pension Advisory Committee**

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

---

**Q3**

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

I would like to use my background in investment management, financial planning and research to work with others on the committee to benefit the city where I live and pay taxes.

---

**Q4**

As a Committee/Commission member, what ideas or projects are of interest to you?

I would be interested in pension related projects, investing, financial reporting and budgeting.

---

**Q5**

Optional Resume:

**Resume 2021 skills F Shiroma.pdf (117.8KB)**

---

**Felice Shiroma, CFA**  
**Costa Mesa, CA**  
[feliceshiroma@comcast.net](mailto:feliceshiroma@comcast.net)  
**Ph: 925-885-9142**

---

### **Summary**

Extensive research experience in fixed income, separately managed account managers and mutual funds. Manage due diligence, communications and performance analysts. Strong financial analysis, editorial and communications skills.

### ***Skills Highlights***

#### **Research**

- Research director for \$12 billion separately managed account platform
- Director of mutual fund research for Schwab's quarterly mutual fund lists
- Fixed income research at rating agency
- Investment manager due diligence
- Researched high yield, corporate, mortgage-backed and municipal bonds

#### **Portfolio Management/Client Portfolio Specialist**

- Manage \$20 billion discretionary wrap program
- Asset allocation and portfolio construction
- Product specialist for U.S., Asian and European high net worth and institutional clients.

#### **Communications**

- Editorial responsibility for client facing materials
- Oversee quarterly production of SMA factsheets and quarterly reviews for over 90 strategies
- Strong editorial and communications skills

### ***Experience***

#### **2-1-1 Orange County**

*Director of Advancement*

**July 2017 - April 2019**

*Santa Ana, CA*

#### **Working Wardrobes**

*Volunteer*

**2016-2017**

*Irvine, CA*

#### **The TCW Co. (Trust Company of the West)**

*Senior Vice President, Client Portfolio Manager, Product Specialist*

**2015-2016**

*New York, NY*

#### **Charles Schwab & Co/Charles Schwab Investment Advisory**

*Managing Director, Investment Manager Research*

**2009-2015**

*San Francisco, CA*

#### **Morningstar Investment Services**

*Investment Manager, Fixed Income Research, Discretionary Wrap Manager*

**2005-2008**

*Chicago, IL*

#### **American Express Financial Advisors**

*Financial Advisor*

**2004**

*San Francisco, CA*

#### **Gimme Credit**

*Corporate Bond Analyst.*

**2002**

*San Francisco, CA*

#### **Conifer Securities/Seneca Capital**

*Cash Management for Hedge Funds at Prime Broker*

**1998-2001**

*San Francisco, CA*

#### **Jurika & Voyles, Inc. (subsidiary of Natixis)**

**1994-1998**

*Vice President, Fixed Income Portfolio Manager*

*Oakland, CA*

**Matson Navigation Company**

*Director, Strategic Planning*

**1990-1993**

*San Francisco, CA*

**L.F. Rothschild & Co.**

*Vice President, Fixed Income Research*

**1988-1989**

*New York, NY*

**Moody's Investors Service**

*Senior Analyst, Corporate Bond Ratings, Transportation Group*

**1983-1988**

*New York, NY*

**Credit Suisse First Boston/Morgan Stanley**

*Assistant to VP, Equity Research*

**1980-1981**

*New York, NY*

***Education***

**Kellogg School, Northwestern University**

MBA in finance and public policy. Arthur Andersen fellowship.

*Evanston, IL*

**Delft Graduate School of Management**

Studies focused on European business. Internship at AMRO Bank.

*Netherlands*

**Yale University**

BA in American Studies. F. Wilder Bellamy prize, varsity crew.

*New Haven, CT*

#19

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, February 25, 2022 11:59:58 AM  
**Last Modified:** Friday, February 25, 2022 12:20:11 PM  
**Time Spent:** 00:20:12  
**IP Address:** 108.215.61.116

---

Page 1

**Q1**

Full Name:

Wendy Leece

---

**Q2**

**Finance and Pension Advisory Committee**

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

---

**Q3**

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

I am a current FIPAC member and would like to continue my service on FIPAC. I believe I bring a good deal of "institutional knowledge" to the Committee having served on FIPAC for several years and also having served as a Costa Mesa City Council Member for 8 years. I would be honored to continue my service.

---

**Q4**

As a Committee/Commission member, what ideas or projects are of interest to you?

I am interested in studying the City's pension obligations and determining if there are cost saving options in addition to the I15 Trust. I serve on the Budget Subcommittee and believe our careful analysis of the current and proposed budgets and recommendations to FIPAC and then FIPAC'S advice to the City Council are very important in these difficult financial times.

---

**Q5**

**Respondent skipped this question**

Optional Resume:

---

#6

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Monday, February 07, 2022 8:23:31 AM  
**Last Modified:** Monday, February 07, 2022 8:30:19 AM  
**Time Spent:** 00:06:48  
**IP Address:** 107.200.216.114

---

Page 1

**Q1**

Full Name:

Gary W Craig

---

**Q2**

**Finance and Pension Advisory Committee**

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

---

**Q3**

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

I am a 30 year Costa Mesa resident and a tax advisor for over 20 years. I am currently a CPA licensed in California and a partner in charge of the tax department at dbbmckennon. I am well versed in the complexities of defined benefit pension plans and liabilities. I understand fund accounting well. I was the former treasurer of the Costa Mesa Community Foundation

---

**Q4**

As a Committee/Commission member, what ideas or projects are of interest to you?

Pension maintenance and analysis, emerging opportunities in pensions. Employee benefits in a competitive employment market. Analytics around city assets and liabilities. Helping create a better Costa Mesa for residents and stake holders.

---

**Q5**

**Respondent skipped this question**

Optional Resume:

---

#31

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, March 02, 2022 11:52:20 PM  
**Last Modified:** Thursday, March 03, 2022 12:41:39 AM  
**Time Spent:** 00:49:18  
**IP Address:** 104.35.218.146

---

Page 1

Q1

Full Name:

Altaf Wahid

---

Q2

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

**Finance and Pension Advisory Committee,  
Bikeway and Walkability Committee,  
Fairview Park Steering Committee**

---

Q3

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

I currently work in corporate financial planning and analysis for a local software company and have extensive experience in budgeting and forecasting that I think would be relevant to the Finance & Pension Advisory and Bikeway & Walkability committees. I also live near Fairview park and regularly walk along the trails near Fairview and Talbert parks so I have a keen interest in their upkeep. I previously volunteered on a committee in Buena Park for 6 years that helped advise on the disbursement of annual CDBG funds. I loved meeting with local organizations and building relationships with community members.

---

Q4

As a Committee/Commission member, what ideas or projects are of interest to you?

Fiscally, it's important to me that we plan and invest wisely for the future while ensuring that our initiatives are appropriately funded. I would also like to help protect the large open spaces that are unique to Costa Mesa. There is very little undeveloped land or large, open community spaces left in Orange County so I think it's vital that we preserve and invest in what remains.

---

Q5

Optional Resume:

**Resume - Altaf Wahid.pdf (15.7KB)**

---



# ALTAF WAHID

Costa Mesa, CA • [altaf.wahid@gmail.com](mailto:altaf.wahid@gmail.com) • (714) 397-3982 • [linkedin.com/in/altafwahid](https://www.linkedin.com/in/altafwahid)

---

## EDUCATION

---

**University of Southern California, Marshall School of Business** – Los Angeles, CA **May 2022**  
*Master of Business Administration*

**University of California, San Diego** – La Jolla, CA **May 2014**  
*Bachelor of Science, Management Science; Minor: Accounting*

## EXPERIENCE

---

**Alteryx (NYSE: AYY)** – Irvine, CA **2019 – Present**  
*Manager, Financial Planning & Analysis*

- Conduct quarterly business reviews with sales leaders across APAC, EMEA, and AMER. Review sales and marketing performance compared to plan and forecast, deliver analytical insights, and provide recommendations to enhance GTM efficiency and drive bookings
- Spearheaded creation of regular monthly touchpoints between FP&A and regional sales leaders to deliver quicker insights and ensure teams are tracking to forecast
- Led a 3-month project to improve revenue and bookings forecast accuracy by building a predictive model to identify deals with a low probability of closing; improved forecast accuracy by 6%
- Oversaw project to design and implement a forecasting and budgeting system (Anaplan). Maintained all revenue and expense models, built a budgeting portal for business leaders to submit AOP requests, and created SOX-compliant reports for quarterly SEC reporting

**LoanDepot (NYSE: LDI)** – Lake Forest, CA **2017 – 2019**  
*Financial Analyst*

- Managed financial planning and reporting systems for fifth largest mortgage loan originator in the US. Redesigned numerous reporting hierarchies, implemented new features, and performed system maintenance during forecast and planning periods
- Led a 6-month project to redesign a company process of pulling credit reports for mortgage applicants. New process resulted in a 12% cost reduction, saving company \$2.8 million annually
- Initiated project to build a centralized finance database to enhance reporting, provide more in-depth revenue and expense analysis, and shorten monthly forecasting process
- Leveraged Alteryx and SQL Stored Procedures to automate manual processes, directly saving team members dozens of hours across FP&A and accounting while providing more timely access to data

**Stearns Lending** – Santa Ana, CA **2014 – 2017**  
*Accountant*

- Served as primary contact between a 40-person accounting team and developers to design, customize, and implement a new accounting system (Workday Financials). Functioned as the System & Business Process Administrator to develop, manage, and improve internal controls
- Built macros using VBA for Excel to manipulate system-generated reports, streamline processes related to loan origination, and format data for upload into accounting system
- Recorded settlements and adjustments of 19 warehouse credit lines across 10 legal entities, prepared month-end reconciliations, and served as sole accountant for 2 joint ventures

## COMMUNITY

---

**Citizens' Advisory Committee on Community Development** – Buena Park, CA **2009 – 2015**  
*Committee Member*

- Met with local non-profit organizations that assist low-to-moderate income families and assessed community impact. Made recommendations to city council on the disbursement of CDBG funds.

#2

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, February 04, 2022 4:50:05 AM  
**Last Modified:** Friday, February 04, 2022 4:54:45 AM  
**Time Spent:** 00:04:39  
**IP Address:** 104.34.17.14

---

Page 1

**Q1**

Full Name:

Sharon Elder

---

**Q2**

**Finance and Pension Advisory Committee,**

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

**Animal Services Committee**

---

**Q3**

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

I've grown up in a public service family. Have lived in Costa Mesa for 30 years. I would like to use my skills to improve our city

---

**Q4**

As a Committee/Commission member, what ideas or projects are of interest to you?

Animals , consistency in education of the public about pet safety.

Pensions fiscal prudence and balanced public safety.

---

**Q5**

Optional Resume:

**RESUME2019.docx (14.3KB)**

---

sae1212@sbcglobal.net

714-349-4155

SHARON ELDER

Objective: My objective is to connect with an organization focused on constant improvement, growth and overall success.

Skills & Abilities: Business Development, extensive business relationships Nationwide. A positive, thoughtful industry leader enabling dealers to navigate change and grow their business. Engaged in Public and Industry relations.

Experience: VP Sales National Monitoring Center

8/2001 – 11/2018

- \*Startup Company, directly responsible for all revenue. Within 12 mos. RMR was \$120K/mo.
- \*Established a National footprint including the opening of a Texas monitoring facility.
- \*Converted in excess of 800 prospects to customers.
- \*Worked closely with development, engineering and operations to evolve service offerings.
- \*Developed channels of Revenue for both Commercial and Residential dealers
- \*Responsible for diversity in client base and market channels
- \*implemented culture of signature hospitality.
- \*Implemented conversion plan to ensure smooth transfer of accounts.
- \*Directly responsible for Client satisfaction.
- \*Developed sales program to train sales team to meet and exceed goals.
- \*Directly responsible for all trade shows, media interviews, and interface with law enforcement and fire services.
- \*Technically competent.
- \*Achieving \$1.4M/mo. in RMR when the Company was sold.

#### Additional Experience:

Western Regional Manager King Central

Branch Manager King Alarm Distribution

Yuasa Battery (America) Inc.

Partner in an Alarm Company since 1994, I have a unique understanding of the professional channel and how to keep step with the dealers. When to ask for the order, when to educate, when to listen and when to follow up in a manner that inspires dealers standardize on services. In depth working knowledge from the proposal process to the General ledger. My ability to show the total procurement picture of the services I sell is a unique one.

An early influencer of branding. I was doing this for alarm panel manufacturers with Yuasa Battery. It's rewarding to work with the dealers to develop their brand beyond their yard signs and stickers.

ESA / CAA member since 1990

Police Liaison for Orange County since 1996

Alarm School trainer Irvine PD since 1996

Orange County Alarm Association Treasurer since 2001

TBFAA member since 2011

#### Awards and Acknowledgements

Marc Walder Award

Mark Schubert Award

Bill Moody Award

#22

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Saturday, February 26, 2022 3:32:48 PM  
**Last Modified:** Saturday, February 26, 2022 3:35:36 PM  
**Time Spent:** 00:02:47  
**IP Address:** 107.119.53.35

---

Page 1

Q1

Full Name:

Hengameh Abraham

---

Q2

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

Finance and Pension Advisory Committee,  
Bikeway and Walkability Committee,  
Cultural Arts Committee

---

Q3

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

Serving the city in any capacity is a passion of mine & I would love the opportunity to serve at either committees

---

Q4

Respondent skipped this question

As a Committee/Commission member, what ideas or projects are of interest to you?

---

Q5

Optional Resume:

inbound7380946663576053567.docx (11.2KB)

---

## HENGAMEH SEYRAFI

OBJECTIVE	An opportunity to apply my 11 years of experience as a pharmacy technician.
SKILLS & ABILITIES	<ul style="list-style-type: none"> <li>● Accurate data entry skills</li> <li>● Able to read, write, and speak English fluently</li> <li>● Strong time management and organizational skills</li> <li>● Excellent communication skills, both orally and in writing</li> <li>● Willingness to be a team player and promote a positive team environment</li> <li>● Excellent attention to detail</li> <li>● Flexible and proactive to meet varied patient needs</li> <li>● Self-motivated and able to work independently</li> <li>● Able to effectively present information to the patient and in small group situations</li> <li>● Dedicated to excellence and quality</li> <li>● Able to collaborate with other healthcare professionals</li> <li>● Strong interpersonal and “people” skills</li> <li>● Experienced in Microsoft Office (Word, Excel, Outlook, etc.)</li> <li>● Able to add, subtract, multiply, and divide in all units of measure; this may include using whole numbers, common fractions, and decimals and being able to compute rate, ratio, and percent</li> </ul>
EXPERIENCE	<p>Nysansa Learning Corporation 640 N. Tustin Ave #101, Santa Ana, CA, 92705</p> <p><b>Behavioral Therapist</b></p> <p>Medlfe Pharmacy &amp; Compounding April 2016 to April 2018 6644 Irvine Center Drive, Irvine, CA, 92618 949-502-7272</p> <p>Lead Tasks as a lead pharmacy technician.</p> <p>Monitor and prioritize workflow of pharmacy technicians, including billing activities.</p> <p>Prepare dosage medications for dispensing into bottles and unit dose packaging.</p> <p>Assist in preparing and dispensing medication under direct supervision of Pharmacist.</p> <p>Filing prior authorization forms and submitting them, submitting Medi-Cal TAR forms.</p> <p>Wal-Mart Pharmacy October 2005 to March 2014 and September 2015 till December 2015 27470 Alicia Pkwy, Laguna Niguel, CA, 92677 949-360-0923</p>

		<p>Supervised technicians and clerks as a lead technician.</p> <p>Inventory for control and non-control medications.</p> <p>Scheduling and replacing floating pharmacist and technicians when needed.</p> <p>Ordering medications and OTC meds daily for inventory.</p> <p>Customer service for patients who have complaints and concerns.</p> <p>Billing insurances of all types from Medical, Medicare, and private insurances and submitting prior authorization forms when needed.</p> <p>Contacting prescribers for medication verification and/or change of medication when needed.</p> <p>On maternity leave from May 2014 till September 2015</p>
EDUCATION		<p>Bachelor of Science in Health Sciences</p> <p>California State University of Fullerton, Graduation Date: January 2012</p> <p>High School Diploma, Mission Viejo High School, June 2004</p> <p>PTCB Certificaiton 410101070950389</p> <p>California Pharmacy Technician License: 80290</p>
REFERENCES		<p>Jason Berg, PharmD</p> <p>Supervisor and pharmacy manager at Walmart</p> <p>949-374-1251</p> <p><a href="mailto:jabber481@yahoo.com">jabber 481@yahoo.com</a></p> <p>Christian Harrison, PharmD</p> <p>949-293-9792</p> <p><a href="mailto:Christianmichaelharrison@gmail.com">Christianmichaelharrison@gmail.com</a></p>

#28

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Tuesday, March 01, 2022 8:43:43 PM  
**Last Modified:** Tuesday, March 01, 2022 8:54:48 PM  
**Time Spent:** 00:11:05  
**IP Address:** 76.87.74.22

---

Page 1

Q1

Full Name:

Colin Paterson

---

Q2

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

**Parks, Arts and Community Services Commission  
(Districts 3)**

,  
**Finance and Pension Advisory Committee,  
Housing & Public Service Grants Committee,  
Bikeway and Walkability Committee**

---

Q3

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

I wish to serve on the selected committees based on my skills, experience, and interests. As someone born at Hoag and currently residing in Costa Mesa, this community means a lot to me and my family. I am a CA licensed attorney with finance experience and additional corporate experience as well. I enjoy helping my neighbors and those in need.

---

Q4

As a Committee/Commission member, what ideas or projects are of interest to you?

Projects that help the most amount of people with basic services, happiness, fulfillment and safety are of the highest priorities. Our community is wonderful but there are always improvements to be made with housing, walk ability and movement, and sufficient urban planning to meet our growing needs.

---

Q5

Respondent skipped this question

Optional Resume:

---



#29

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, March 02, 2022 2:30:20 PM  
**Last Modified:** Wednesday, March 02, 2022 2:37:41 PM  
**Time Spent:** 00:07:20  
**IP Address:** 104.129.199.77

---

Page 1

**Q1**

Full Name:

John Duffy

---

**Q2**

**Finance and Pension Advisory Committee**

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

---

**Q3**

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

As someone who has worked in finance for many years I know I can add value to the committee and help guide spending to help improve the town where we need it.

---

**Q4**

As a Committee/Commission member, what ideas or projects are of interest to you?

I want to help make sure the town's spending is used where it is needed the most and continue making Costa Mesa a beautiful, safe, and fun town for people to visit and live in!

---

**Q5**

Optional Resume:

**John Duffy-Resume.docx (28.6KB)**

---

# **John (Jack) A. Duffy**

**147 Flower St. Apt H, Costa Mesa, CA 92627 (520-488-9415) Duffy109@mail.chapman.edu**

## **PROFILE**

An ambitious, dedicated and hardworking accountant looking to leverage extensive experience and a proven track record in a corporate environment to improve the already beautiful town of Costa Mesa and help continue to guide it in the right direction.

## **EDUCATION**

*Chapman University, (Orange, CA)*

*Argyros School of Business*

BA in Accounting – May 2017 GPA 3.5/4.0

Minor in Nutrition and Performance

## **CORE STRENGTHS AND COMPETENCIES**

- *Conscientious, analytical and detail-oriented self-starter, who is highly organized, dedicated and takes initiative with minimal supervision. Able to multi-task effectively and not afraid of hard work.*
- *Productive worker with solid work ethic who exerts optimal effort in successfully completing tasks. Works very well under pressure and extensive hours during “quarter-close”. Recognized for a “can do attitude” and willingness.*
- *Confident, dependable and responsible contributor who is committed to achieving nothing less than excellence. Established a go-to reputation inside the department.*
- *Resourceful team player who excels at building trusting relationships with customers and colleagues. Established and maintained professional relationships with customers and staff.*

## **RELEVANT WORK EXPERIENCE**

Pacific Life Insurance Company (Aliso Viejo, CA)

8/2017 - Present

*Reinsurance Accountant II*

- Primarily responsible for the accounting, reconciling and reporting for the Division’s reinsurance activities and will support other team member(s) with financial reporting duties. Conducts regular communications with the reinsurers, including requesting and sharing accounting and reporting information.
- Recommends and implement solutions to problems, requiring the regular use of ingenuity and creativity, within the larger context of the business needs and objectives.
- Works directly with the “TAI” reinsurance system to ensure accuracy of all accounting data, implement and test fixes/updates in the system, and extract data for analysis to provide management with the information better need to make decisions.
- Spearheaded the “Reinsurance Transformation Project” to automate entire manual accounting processes done every quarter. Worked directly with system developers to build a “DataMart” to house all reinsurance accounting data.

Harborside Restaurant & Grand Ballroom (Newport Beach, CA)

1/2015 - Present

*Banquet Bar Manager – part time*

- Trained new staff on service expectations, protocols and problem resolution. Managed cash/inventory reconciliation. Optimized bar and server revenue. Repeatedly recognized for ability to cover multiple positions and daily staff needs. Assisted manger in supply inventory and prepared daily reports. Delivered exceptional, friendly and fast service.

Proficiencies: MS Office including expert level knowledge in Excel, Alteryx Automated Analytics

# #41

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 03, 2022 4:27:28 PM  
**Last Modified:** Thursday, March 03, 2022 4:44:00 PM  
**Time Spent:** 00:16:31  
**IP Address:** 104.34.16.195

---

Page 1

## Q1

Full Name:

Jennifer Leigh Tanaka

---

## Q2

**Finance and Pension Advisory Committee,**

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

**Animal Services Committee**

---

## Q3

Indicate why you wish to serve on this Committee/Commission. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Commission. A resume (optional) may be attached.

I am interested in serving on the finance and pension committee because I want to serve the Costa Mesa community, and because I believe a City's budget is the best representation of its priorities. I have had the pleasure of learning more about the City's services and processes through my advocacy work on behalf of a local park (Harper Park) and as a board member for the Costa Mesa Alliance for Better Streets. Both experiences have touched on the budgeting and financing processes, as both involve significant capital investments. It would be an honor to use my experience and expertise in investments and finance to help the City achieve its fiscal goals.

I am also interested in being considered for the Animal Services Committee. As a life-long dog owner and an avid hiker, I have a strong love of animals and nature. I hope to see city policy reflect a humane and welcoming attitude to pets, as well as a respectful and conservation-oriented approach to wildlife management. I have served as a foster dog mom in the past so I am well aware of the challenges facing our pet management policies.

---

#### Q4

As a Committee/Commission member, what ideas or projects are of interest to you?

I am very interested in learning more about the trade offs that are being made by the City regarding long term obligations, such as pensions, versus current personnel requirements and salaries. As pension obligations grow, careful budgeting and planning will be required to ensure that we can hire and retain the personnel we need to provide vital services as well as make beneficial capital improvements. I am also keenly aware of the rapidly rising costs of living in our area, which will put more pressure on short-term salary obligations. As I learn more about these trade offs, I hope to be able to provide the City with advice to navigate these challenging times.

With respect to the animal services committee, my number one interest is to explore the ways open space can be utilized by dog owners in a way that expands off-leash areas while being respectful of other users of public lands. I am also interested in finding ways to reduce the unwanted pet population, which leads to heartbreaking decisions to destroy worthy animals. And finally, given Costa Mesa's proximity and inclusion of a number of open space preserves, I want to advocate for protection of our open spaces while maintaining public access. As a mother of two, my children have received enormous benefits by being able to experience nature up close, so I hope to be able to preserve and expand that opportunity for everyone in the City.

#### Q5

Optional Resume:

**Resume (Jenn Tanaka).pdf (87.1KB)**

#### Q6

Contact Information: Note: This contact information will not be posted on the City's website or distributed to the public. However, this information is still subject to release pursuant to the California Public Records Act.

Name:

**Jennifer Leigh Tanaka**

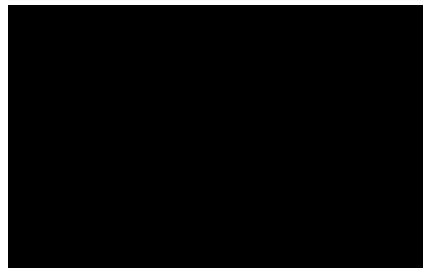
Address:

City/Town:

ZIP/Postal Code:

Email Address:

Phone (cell):



#### Q7

Signature Required

**By checking this box and typing my name below, I am electronically signing my application.**

#### Q8

Full Name:

Jennifer Leigh Tanaka

# Jennifer L. Tanaka

321 Broadway, Costa Mesa, CA 92627  
(919) 414-2030 • [jletanaka@gmail.com](mailto:jletanaka@gmail.com)

---

## EDUCATION

University of Michigan Law School	2009-2012
Juris Doctor, <i>magna cum laude</i> , Order of the Coif	
University of Chicago	2008-2009
Master of Arts, International Security and Political Economy, Honors	
Duke University	2004-2008
Bachelor of Arts, Political Science and History, <i>magna cum laude</i> , Honors	

---

## LEGAL EXPERIENCE

Pathway Capital Management, LP	2018-Present
--------------------------------	--------------

*Vice President and Assistant General Counsel, Senior Counsel, Counsel; Irvine, CA*

- Led the secondaries practice within the legal team and independently completed over \$100 million of buy- and sell-side secondary market transactions, including rollovers
- Negotiated primary investments in private equity and venture capital funds and co-investments on behalf of multiple limited partners, including pension plans, funds-of-funds and non-profit corporations
- Served as a product owner of an internal workflow and data management platform for the legal department, now a blueprint for a system for all other Pathway departments

Gunderson Dettmer Stough Villeneuve Franklin & Hachigian, LLP	2015-2018
---	-----------

*Corporate Associate, San Diego, CA and New York, NY*

- Represented venture-backed companies and venture capital funds in financing transactions, including private equity offerings, IPOs, venture debt financings, and venture capital investments; also represented venture-backed companies in merger and acquisition transactions on both buy- and sell-side

Hyperloop Technologies, Inc. d/b/a Hyperloop One	Fall 2017
--	-----------

*Corporate Counsel on Secondment, Los Angeles, CA*

- Served as temporary corporate counsel on secondment reporting directly to the General Counsel; led negotiations on behalf of the company for a \$50 million convertible note round and independently managed numerous compliance and regulatory matters

Cravath, Swaine & Moore LLP	Summer 2011, 2012-2015
-----------------------------	------------------------

*Summer Associate, Corporate Associate; New York, NY*

- As a junior, mid-level and lead associate, represented investment banks, public corporations and private companies in a variety of financing and other transactions, including initial public offerings, bond and stock offerings, mergers and acquisitions, and debt financings

---

## BAR ADMISSIONS

California State Bar	2017-Present
New York State Bar	2013-Present

---

## VOLUNTEER ASSOCIATIONS

Costa Mesa Alliance for Better Streets	2021-Present
<i>Board Member</i>	