

# #19

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, March 06, 2024 7:45:17 PM  
**Last Modified:** Wednesday, March 06, 2024 7:48:54 PM  
**Time Spent:** 00:03:37  
**IP Address:** [REDACTED]

---

Page 1

**Q1**

Full Name:

Quinn Callanan

---

**Q2**

**Finance and Pension Advisory Committee**

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

---

**Q3**

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.

I'm an active Chartered Financial Analyst. I currently work as a Investor Relations Consultant. In my prior role I serviced Corporate and Public pension plans for a large investment manager.

---

**Q4**

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

Finance and Pension Advisory

---

**Q5**

Optional Resume:

Quinn%20Callanan%20Resume%202023%20FINAL.pdf (154.7KB)

---

## INVESTOR RELATIONS / STRATEGIC COMMUNICATIONS

Investor Relations professional with extensive experience analyzing and consolidating complex economic data into key messages, reports and publications for clients, industry partners and the media. Particular expertise distilling complex topics into strategic communications while building a firm's reputation and industry position. Expert-level fluency in financial presentations with the ability to manage all aspects of the investor relations function for an organization.

### KEY COMPETENCIES

- Investor Relations / Strategic Communications
- Investor Relations / Reputation Management
- Economic Commentary / Market Outlooks
- Analyst Engagement / Surveys / Presentations
- Corporate Positioning / Key Messaging
- Financial Commentary / Whitepapers
- Complex Economic Topics / Technical Writing
- Industry Snapshots / Press Releases / Media
- Market Research / Economic Research / Bloomberg
- Content Development / Writing / Marketing
- Meeting Organization / Hosting / Public Speaking
- Data Analysis / SQL / Excel / VBA / Python

### PROFESSIONAL EXPERIENCE

#### **SVP Investor Relations, MZ Group - MZ North America**

**3/2022 - present**

Manage a corporate client list of 9 organizations spanning technology, defense, FinTech, and healthcare. Manage comprehensive Investor Relations programs designed to articulate a company's position, brand, news and reputation.

- Craft narratives and messaging to express company updates including scripts, investor decks, key talking points, briefs, summaries, and other storytelling modalities for the investor audience
- Author press releases and ensure all communications adhere to SEC regulations
- Synthesize management and investor KPIs and help executive leaders bridge gaps to create new angles and stories
- Work directly with clients and manage C-Suite expectations, keeping stakeholders up to date on investor feedback
- Expand investor base and facilitate equity raises by engaging bankers and investors within calls, meetings, and events
- Plan conferences and investor days with onsite, conference activities, breakouts, and one-to-one meetings with C-Suite

#### **Senior Client Service Associate, Corporate - Western Asset Management Company**

**2015 - 2022**

Published complex and sophisticated communications on behalf of Chief Economist to position firm's reputation and voice to clients, industry consultants and media. Key representative of the firm, improving communications and data used for key messaging.

- Produced 30+ thought leadership pieces a year in collaboration with the firm's Senior Economist
- Wrote whitepapers, proposals, market commentaries, client reports and position papers to demonstrate leadership and influence across the organization and to protect the firm's industry-facing reputation
- Composed regular commentary, wrote marketing and web copy, built investor packages and supported global sales
- Communicated with the investment team to create strategies for communicating portfolio themes with clients
- Increased website interactions 5x by optimizing layout of whitepapers and improving user experience
- Implemented Adobe Analytics to track, measure and create new metrics for user interactions and engagement
- Automated workflows for producing complex economic materials, documents and spreadsheets to reduce workload for Chief Economist and SMEs, improving schedule performance by 12%
- Worked directly with Chief Economist to calculate, benchmark and communicate pension liability returns for custom LDI portfolios, acting as subject matter expert with responsibilities for developing key messages and materials
- Automated reporting, improved dashboards and CRM, wrote Python queries, streamlined RFP processes and benchmarks

#### **Business Development Associate, Fixed Income - Pacific Investment Management Company (PIMCO)**

**2012 - 2015**

Responsible for strategic communications between clients and firm regarding views on markets and strategies, fund and account proposals, marketing materials, and product development initiatives.

- Authored 50-200 page requests for proposals for separate account, mutual fund, and commingled funds with detailed information about investment process, key leadership staff, and outlining investment strategy specifics
- Standardized presentations, marketing materials and website content, and restructured reporting tools

#### **Universal Banker - US Bank**

**2008 - 2012**

Interfaced with a wide audience of clients and prospects to position mortgage land business lending services. Negotiated between clients and underwriters to assess risk, provide guidance and advance deals in alignment with bank policies.

### EDUCATION, CFA AND LICENSURE

B.A. Political Science and Government - University of California, Los Angeles (2007)  
Chartered Financial Analyst (2015), FINRA Series 7 and 63 (2012 - present)

#25

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, March 08, 2024 2:36:56 PM  
**Last Modified:** Friday, March 08, 2024 3:06:15 PM  
**Time Spent:** 00:29:18  
**IP Address:** [REDACTED]

---

Page 1

**Q1**

Full Name:

Sean Healey

---

**Q2**

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

**Animal Services Committee ,  
Finance and Pension Advisory Committee**

---

**Q3**

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.

Animal Service Committee - I am resident with three rescue terriers. I have a love of all animals and want to ensure that they are the raised in a proper environment and want to be part of the city's effort to help in that regard.

Finance and Pension Advisory Committee - My major and employment background have been in Finance and Banking. Although I don't have a background in Pension or Retirement forecasting I am very analytical and have experience making various forecasting models.

---

**Q4**

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

Animal Service Committee - Outreach and pet licensing - Admittedly I have not been the best about licensing my dogs and I think a huge part of it is that it is just not on my mind. So my goal would be to spread outreach possibly partnering with vets in the area to ensure that pets get licensed. I also want people to see what the benefits of what they get when they license their pet. Our community nextdoor posts are 35% lost pets and if we can implement something like an AI match of found pets to the photos of licensed ones I think we can be able to help with that. Another way to promote licensing is to do chip events. A lot of people think their pet is chipped but they don't know for certain and if their pet is chipped, a lot of times it could be outdated information. By holding an event where we can scan and assist residents in updating their pets chips we can demonstrate tangible value of getting their pet licensed.

Finance and Pension Advisory Committee - Besides reviewing the city's budgets, finances, investments and contracts I am not sure what specific projects the committee normally takes on. I am however, very eager to learn more about our city's financial operations and contribute in any way I can.

**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:	Sean Healey
Address:	[REDACTED]
City/Town:	[REDACTED]
ZIP/Postal Code:	[REDACTED]
Email Address:	[REDACTED]
Phone (cell):	[REDACTED]

**Q7**

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

Signature Required:

**Q8**

Full Name:

Sean Healey

# SEAN HEALEY

## WORK HISTORY

### **PORTFOLIO MANAGER** 03/2023 to Current

#### **CommerceWest Bank**, Irvine, CA

- Managed diverse commercial loan portfolio of C&I and CRE loans.
- Underwrote complex C&I deals for core prospects which involved financial analysis, term and covenant structuring and preparation of credit recommendations

### **SENIOR UNDERWRITER** 10/2021 to 03/2023

#### **Integro Bank**, Remote

- In charge of setting up the Loan Origination System for Integro Bank including bank processes related to credit applications, underwriting, presentation, loan documentation and boarding of commercial loans
- In charge of structuring and underwriting Integro Bank's commercial loans including lines of credit, term loans and real estate
- Helped build a platform for providing Integro Bank's business customers with actionable insights (scenario forecasting, valuation, ratio analysis) based on a customer's financials and peer data

### **PORTFOLIO MANAGER, AVP** 06/2018 to 07/2021

#### **Pacific Mercantile Bank**

- Underwrote complex C&I deals for core prospects which involved financial analysis, term and covenant structuring and preparation of credit recommendations
- Managed Pacific Mercantile Bank's Irvine portfolio including preparing modifications and renewals of existing credits
- Facilitated collection, spreading and analysis of customer reporting items
- Leader in the transition and implementation of the Bank's spreading and monitoring software from CASH suite to CreditTrack, requiring advance knowledge of excel and bank operations
- Improved automated and created reports and procedures for the loan monitoring group.

### **FINANCIAL ANALYST** 11/2015 to 05/2018

#### **Western National Group**

- Maintained and updated financial models for WNG's two multifamily funds analyzing key financial ratios and projected fund returns
- Reviewed and compiled quarterly financial statements and presentations for fund investors
- Maintained and improved asset and financial models with accounting information and market projections
- Assisted acquisitions team in underwriting potential multifamily acquisitions.

### **CREDIT ANALYST** 06/2014 to 10/2015

#### **Federal Home Loan Bank of Chicago**

- Monitored and determined security haircuts using credit model components such as Value

at Risk, Model Risk, Liquidation Risk, Management Discretion and Financial Strength Adjustments

- Created back testing database and procedures to monitor member's security collateral portfolios
- Assisted in running the OTTI process using CoreLogic's Risk Model software to determine quarterly Credit losses on the Bank's private-label MBS portfolio
- Actively managed collateral portfolios for members, which include loans, securities and cash positions
- Processed and handled members' security payments and transactions including sales, purchases and account transfers.

---

## EDUCATION

**University of California Irvine - Data Analytics Boot Camp**

**Other**, Data Science, 11/2021

**University of Notre Dame**, Notre Dame, IN

**Bachelor's**, Finance, 05/2014

# #1

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Saturday, February 10, 2024 8:08:23 PM  
**Last Modified:** Saturday, February 10, 2024 8:50:58 PM  
**Time Spent:** 00:42:34  
**IP Address:** [REDACTED]

---

Page 1

## Q1

Full Name:

Syed Zia Hussain

---

## Q2

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

**Animal Services Committee ,  
Active Transportation Committee,  
Finance and Pension Advisory Committee,  
Housing and Public Service Grants Committee ,  
Mobile Home Park Advisory Committee**

---

## Q3

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.

I am a fresh graduate from Cal Poly Pomona State University undergraduate degree in Urban Planning. I have volunteered with Civic Well Climate Forum 2023, I am also serving at the Mobile Housing Committee City of Costa Mesa at this moment. I have conducted couple of research in Costa Mesa, CA voluntarily. I find Costa Mesa one of the best cities within Orange County and believe it has a lot potential to improve and imply sustainable solutions for future growth.

---

## Q4

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

I would like to serve as a Costa Mesa resident. I have been living here for 11 years. As a City of Costa Mesa Committee member, I would be able to play my part in finding better and sustainable solution to further improving the Costa Mesa.

---

## Q5

Optional Resume:

**URP-Full%20Resume.pdf (272.5KB)**

---

**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: **Syed Zia Hussain**  
Address: [REDACTED]  
Address 2: [REDACTED]  
City/Town: [REDACTED]  
ZIP/Postal Code: [REDACTED]  
Email Address: [REDACTED]  
Phone (cell): [REDACTED]

---

**Q7**

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

Signature Required:

---

**Q8**

Full Name:

Syed Zia Hussain

---

# Syed Zia Hussain

Member of Mobile Housing Committee, City of Costa Mesa, CA. 2023.  
[Ziahussain2019@gmail.com](mailto:Ziahussain2019@gmail.com). Cell phone: 1-714-280-3730

## Education

<b>Cal Poly Pomona, California, CA.</b> Bachelors of Urban Planning. GPA 3.16	<b>Dec 2023</b>
<b>Orange Coast College. California, United States.</b> Associate degree in Architecture (Honors) GPA 3.36	<b>Dec 2019</b>
<b>Orange Coast College. California, United States.</b> Associate Degree (Honors) in Event Management GPA 3.36	<b>Dec 2016</b>

## Relevant Coursework

**CEQA 101** online Course (Gov. Office Planning and Research).  
**URP 4040 Place-making** – Study Florence-Graham city. In final research presentation proposed solutions to the S. Central Ave and E. 74 Street. Focus of the research was to make the site more safer, and children friendly because of the Wisdom Elementary School.  
**Advance Project Management** from Coastline Community College.

## Freelance Projects

**2023 –To-date**  
 Community Enrichment Program, Civic Well 2023 Adaptation Climate Forum – Support to recruit volunteers, Videography on “Impact of McBride Park Long Beach on Youth”  
[McBride Park Impacts on the Youth Community Long Beach, California. - YouTube](#)

## Work Experience

<b>Community Service Leader II</b> Work for R.O.C.K Program, it is after school program served by Recreation Department, City of Costa Mesa, CA. Require self-motivation and team-player abilities. Assist with program planning on field; maintain record of schedule and log-book of day to day duties and hours of work. Supervise check-in and check-outs, activities, fire drills, help with homework, artwork and games, and keep a health and safe environment.	<b>Jan '24 - update</b>
<b>Student Connect SoCal Community Outreach: SCAG Project</b> Engage public to fill out surveys, conduct street events, Research and suggest new locations for more survey	<b>May '23-June '23</b>
<b>Planning Aide Intern:</b> Cal Poly Pomona Facility Planning and Management, CA. Record keeping, cold calls, drawing figure grounds, site analysis, printout architectural drawing, keeping files, report writing, and administrative work.	<b>June '22-July '22</b>
<b>Administrative Intern</b> City of Tustin Department of Community Planning, Tustin, CA. Review variance, condition permits, and design reviews, Quality control and update code files. Customer service and attend phone calls. Review General Plan, zoning, subdivision, and environmental report review. Work as a team and individually.	<b>Oct '21- Feb '22</b>
<b>Recreation leader</b> <b>City of San Clemente, San Clemente.</b> Supervised Summer campus games and activity for children, manage inventory, customer service, games, and setups and breakdowns.	<b>June'20 –Oct'21</b>
<b>Event Planner Unpaid Intern</b> <b>American Family Housing, Tustin, CA</b> Outreach, promotion, and marketing for “Summer Festival for Homeless Veterans”. Sold out a stall and raise more than \$ 3,000 through bringing in vendors.	<b>June'15 –Dec'15</b>

**Awards and Recognitions:**

Research on Walkability, presented at OCC Symposium 2019 and 2020 and Cal Poly Pomona 2023.

Topic: *"Effects of New High-Density Residency on Walkability in Costa Mesa, CA"*.

Topic: *"How Mix-Use Land Contributes to Walkability in 19<sup>th</sup> Street, Costa Mesa, CA."* 2023.

**Administration Skill:** Comfortable working in, group and individual setting, research, excellent customer service skills, and marketing and sales experience, organizational skills, general clerical tasks, data managing, data entry, report writing, and event management.

#3

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Tuesday, February 13, 2024 3:51:20 PM  
**Last Modified:** Tuesday, February 13, 2024 4:11:15 PM  
**Time Spent:** 00:19:55  
**IP Address:** [REDACTED]

---

Page 1

**Q1**

Full Name:

James Andrews

---

**Q2**

**Finance and Pension Advisory Committee**

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

---

**Q3**

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.

I am a Costa Mesa resident with a young family, I plan to live here for the next 30+ years. Costa Mesa is an incredible city with charm and soul, I simply want to make myself available to be helpful - should the leadership team have the need. I am a financial advisor for The Bahnsen Group and spend my days advising families and institutions on how to best deploy their resources. I serve on the Board of a local non-profit as well. I have no political motivations beyond making myself available as a resource for the city.

---

**Q4**

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

Prudent financial management of the budget, investment portfolio, and general financial planning. Wealth is a tool to be used in a way that maximizes the projects and goals that are important to CM leadership.

---

**Q5**

Optional Resume:

**James%20Andrews%20Resume%20for%20Costa%20Mesa%20Committee.pdf (63.7KB)**

---

**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: **James Andrews**  
Address: [REDACTED]  
City/Town: [REDACTED]  
ZIP/Postal Code: [REDACTED]  
Email Address: [REDACTED]  
Phone (cell): [REDACTED]

---

**Q7**

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

Signature Required:

---

**Q8**

Full Name:  
James Andrews

---

# James Andrews, CFP®

I am deeply passionate about holistic financial planning for families and institutions; providing tailored advice to help clients meet their unique goals. Drawing from my years of experience in the RIA industry, I also bring a unique perspective on growth opportunities available to independent firms. My off-hours are spent helping my wife chase our two boys and enjoying the occasional pick-up hockey game.

Costa Mesa, CA

(949) 284-5313

jandrews@thebahnsengroup.com

## SOFTWARE

eMoney Advisor

MoneyGuide Pro

Schwab

Fidelity

Salesforce

Envestnet

## HOBBIES

Chess

Volunteering

Hockey

Family

## EDUCATION

### California Polytechnic University

Pomona, CA

2010 — 2014

B.S. Entrepreneurial Finance

## CERTIFICATIONS & AWARDS

CERTIFIED FINANCIAL PLANNER™

Eagle Scout

## WORK EXPERIENCE

### Private Wealth Advisor, The Bahnsen Group

2022 — Present

- Advise clients in the areas of investment, tax, retirement, education, insurance and estate planning; working closely with the advisory team to support overall planning needs as well as company objectives.
- Construct custom portfolio allocations in light of client's risk profile, cash-flow needs, and long-term objectives.
- Actively monitor financial markets, specific investments in client's portfolios, and keep abreast of new investment strategies.
- Proactively identify client's issues and/or opportunities identified as a result of having an intimate knowledge of the client's entire financial life.

### Wealth Manager, Goldman Sachs Personal Financial Management

2022 — 2023

- Advise clients in the areas of investment, tax, retirement, education, insurance and estate planning; working closely with the advisory team to support overall planning needs as well as company objectives.
- Successfully lead clients through the client experience process resulting in gathering significant and pertinent data as it relates to the clients entire financial life.
- Actively monitor financial markets, specific investments in client's portfolios, and keep abreast of new investment strategies.
- Proactively identify client's issues and/or opportunities identified as a result of having an intimate knowledge of the client's entire financial life.

### Relationship Manager, Goldman Sachs Personal Financial Management

2020 — 2022

- Directly responsible for the management and monitoring of client relationships under the direction of the advisory team.
- Track 100% of client interactions including requests, inbound/outbound calls and emails.
- Actively prepare for and participate in client meetings as requested by the advisory team.
- Prepare all deliverable materials associated with the meeting type.

### Business Development Analyst, United Capital Financial Advisers

2015 — 2020

- Conduct financial analysis, including the development of detailed financial models, valuations and ad hoc analyses.
- Collaborated across the organization with Marketing, Legal, Technology and Operations to execute delivery of business development initiatives.
- Worked closely with the C-suite on a pricing strategy based on changing market trends and a spectrum of opportunity profiles.

# #13

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, March 01, 2024 9:23:43 AM  
**Last Modified:** Friday, March 01, 2024 9:46:22 AM  
**Time Spent:** 00:22:38  
**IP Address:** [REDACTED]

---

Page 1

**Q1**

Full Name:

Kathryn Grant

---

**Q2**

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

**Finance and Pension Advisory Committee,  
Housing and Public Service Grants Committee**

---

**Q3**

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.

I am interested in 2 committees. I love all things finance because I am a high school math teacher. I am interested in making sure our city stays on budget and is fair to its employees regarding pension. The housing and public service committee interests me because I have remodeled and custom built 2 homes of my own in Costa Mesa and gone through all the planning/permitting and construction process. I also want to help our city with housing issues and help solve any problems we have.

---

**Q4**

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

- Building/expanding housing in our city meanwhile ensuring our current homeowners & citizens have little negative impact .
  - Keeping finances in order and preventing debt
  -
- 

**Q5**

**Respondent skipped this question**

Optional Resume:

---