

Applications for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

The Clerk of the Board of Supervisors received the following applications from qualified individuals to be considered for appointment to the Elective Office of the County of San Diego Treasurer-Tax Collector (listed alphabetically by last name):

	Applicant First Name	Applicant Last Name	Page #
1	Michael	Aviles	3
2	David	Baker	23
	Robert	Brown [WITHDRAWN]	37
3	Lawrence	Cohen	49
4	Carrilyn	Ford	67
5	Gregory	Hodosevich	87
6	Shirley	Nakawatase	109
7	Zeb	Navarro	127
8	Christian	Peacox	151
9	Rafe Edward	Trickey, Jr.	167
10	Detra	Williams	181

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Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

Michael

First Name

Aviles

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD CLERK OF THE BOARD
2025 SEP 19 AM 8:41



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Application Timeline

- | | |
|---------------------------|---|
| September 22, 2025 | Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon. |
| September 30, 2025 | Hearing on all applicants. Please plan to attend this meeting. |

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ **Yes, I understand**

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ **Yes, I understand**

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A. Tell us About Yourself

First Name: Michael

Last Name: Aviles

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Type:

Cell

Phone 2:

Type:

E-mail:

Have you lived at your current address for more than five years?

☐ Yes

☒ No

If no, please list your previous addresses on page 4.

MS

**If you have not lived at your current address for more than five years, please list
your addresses for the past five (5) years:**

Date From: 2020 Date To: 2021
Street Address: [REDACTED]
City: [REDACTED]
State: [REDACTED] Zip Code: [REDACTED]

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840): ☒ Yes ☐ No
Select all that apply and attach appropriate verification.
 - ☒ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☐ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

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5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

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C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

I am seeking the opportunity to serve as Treasurer-Tax Collector because I believe deeply in the responsibility to steward and safeguard public funds with transparency, integrity, and accountability. My qualifications for this position stem from my experience as Chief Business Officer for a local school district, where I oversee the management of a multi-million dollar budget, diverse revenue and expenditure streams, and critical public programs that directly impact our community and our students.

In my current role, I am responsible for the full spectrum of business services in the district. This includes developing and administering the annual budget, forecasting long-term revenue and expenditure streams, and ensuring compliance with state and federal requirements, as well as Governmental Accounting Standards Board (GASB) regulations. I manage not only the district's general fund, but also a variety of restricted and specialized funds such as the Cafeteria fund, developer fees, and community facilities district (CFD) funds. Each of these revenue sources has unique legal requirements and reporting structures, which require me to become adept at balancing compliance with practical fiscal management to ensure the district receives the maximum benefit to the students and families of our community with the available funding.

I also oversaw the district's first bond measure; working closely with legal and financial advisors to ensure that every dollar was allocated for necessary, well-defined purposes. This experience helped strengthen my belief in the importance of transparency and community trust in public finance. Working in a rural district where resources are harder to come by for our families, it was important to build this trust with the community to help ease any concerns that an additional tax burden would be wasted and spent imprudently.

Furthermore, as a member of the superintendent's executive cabinet, I provide strategic financial guidance that extends well beyond general ledgers. I help ensure that fiscal decisions are aligned with the district's mission and long-term goals, while communicating clearly to both our governing board and the public. I work collaboratively with auditors, department heads, and other stakeholders to produce accurate and timely reports, ensuring that taxpayer dollars are deployed effectively.

I also understand the human side of financial stewardship. My leadership of departments such as Business, Maintenance and Operations, Child Nutrition Services, and Transportation requires me to not only manage numbers, but also to manage people and programs in a way that supports essential services for the community. I take seriously the responsibility of ensuring that fiscal management translates into real, tangible benefits such as safe schools, healthy meals, and reliable transportation. This would translate seamlessly as I would ensure that county revenues are managed to support public services and infrastructure and every dollar collected is maximized to its full potential.

I recognize that the role of Treasurer-Tax Collector is one of immense trust. Taxpayers expect their funds to be managed prudently, invested wisely, and reported transparently. My career has prepared me for that exact responsibility. I bring technical expertise in public finance, proven experience managing diverse funds, a track record 500 word max exceeded. Text redacted.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

For me, it's quite simple. I believe deeply in the value of public service. Up until this point, that has been through public education. However, I could imagine a future when that public service extends beyond my community and into the wider county. For me, public service has never been about title or recognition; it is about the responsibility to server others with humility, integrity, and purpose. In my current role as Chief Business Officer for a local school district, I have embraced the mission of being a servant leader. This means placing the needs of the whole above my own desires and making decisions that maximize the outcomes for our students, families, and broader community.

Unfortunately, I believe that over the past few years, this principle has been eroded in public service. Too often leadership roles are seen as positions of personal gain or platforms for individual ambition, rather than an opportunity to serve. I see this position differently. Being entrusted with the management of taxpayer dollars is is one of the most important fiduciary responsibilities in local government. That trust cannot, and should not, be taken lightly. It demands selflessness, transparency, and a steadfast commitment to the public good.

At our district we have a motto: "until the last moment, until the last child, we serve, we lead, we grow." I carry that motto with me well beyond the walls of education because it represents a universal truth about leadership; it is not about the leader, it's about those we serve. The same spirit applies to this role. The funds managed by this office are not abstract numbers on a financial statement, they are resources for the public good. Resources that fuel public safety, infrastructure, schools, and other essential services that impact every resident in San Diego county. Stewardship of these resources must be done with the same care and diligence as serving kids in a classroom.

I want to step into this role because I believe I can help restore and strengthen the public's trust in public institutions. By leading with integrity and transparency, and by embracing the ideal of servant leadership, I hope to demonstrate that government can still be a force for good when leaders put others before themselves.

I wish to serve as Treasurer-Tax Collector because I believe it is my duty as a public servant to ensure that every decision I make, every dollar I manage, and every action I take reflects the simple truth that leadership is service, and we are here to serve the people.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

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D. Signature

I, Michael Aviles, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 18 day of September, 2025, at San Diego, California.

Signature: _____

E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.

EDUCATION & CERTIFICATIONS

University of California, Berkeley

Bachelor's, Interdisciplinary Studies, GPA: 3.28

August 2007 – December 2010

Rhine-Waal University of Applied Sciences

Bachelor's Coursework, Mechatronic Systems Engineering

September 2015 – July 2016

CASBO

CBO Partner Training Program

Director of Fiscal Services coursework completed

Graduated August 2018

WORK EXPERIENCE

Valley Center-Pauma Unified School District, Valley Center, CA

July 2023 – Current

CHIEF BUSINESS OFFICER

- Assist the superintendent in developing the district's long-range financial program, budget, and financing plans for all district operations.
- Direct the management of all district funds, including the General Fund and Community Facilities District (CFD) funds, ensuring compliance with state and federal regulations.
- Oversee the collection, accounting, and allocation of developer fees, aligning fund use with district growth and capital needs.
- Monitor cash flow and financial activities, ensuring prudent stewardship of public resources.
- Prepare and present financial reports to the Board of Education and community stakeholders, providing transparency and accountability in fiscal operations.
- Coordinate annual audits and ensure adherence to Governmental Accounting Standards Board (GASB) requirements.
- Serve as a member of the superintendent's executive cabinet, representing business services in particular but helping the leadership team with all aspects of district functions, including curriculum/instruction and human resources. Provide advice and counsel to the superintendent and board on matters relating to business operations. Attend all weekly and ad hoc cabinet meetings.
- Direct the district's risk management program, assuring proper coverage through the JPA in the area of property & liability insurance
- Develop, implement, and monitor internal controls to mitigate financial and operational risks, safeguarding students and district resources.
- Oversaw the district's first bond measure, including planning, compliance, community outreach, and collaboration with legal and financial advisors.
- Collaborate with architects, contractors, and facilities staff to prioritize projects that maximize instructional impact and long-term infrastructure value.
- Oversee districtwide business services through the Directors of Finance, Maintenance & Operations, Child Nutrition Services, and Transportation, ensuring efficient, student-focused operations.

- Direct the maintenance, repair, and replacement of district facilities and equipment, improving operational reliability and extending asset life.
- Guide Child Nutrition Services in implementing wellness initiatives, ensuring compliance with federal nutrition standards while expanding access to healthy meals.
- Oversee the district's transportation program, including fleet maintenance, infrastructure projects, and student safety compliance.

Valley Center-Pauma Unified School District, Valley Center, CA

May 2017 – July 2023

DIRECTOR OF FINANCE

Budgeting

- Collaborated with Cabinet, various department heads and site leaders and used the LCFF calculator and enrollment models to develop the District's yearly ~\$50M budget.
- Constructed the multi-year projection used for budget adoption and interim reporting.
- Worked with the County to complete and submit the District's cash flow projections at budget adoption and during interim reporting periods.
- Completed budget adjustments as needed to help keep sites, resources, and departments within their budgets and accurately conveyed through the interim reports and closing.
- Projected the District's lottery revenue and divided it up between the District's eight sites. Sent a budget template to site Principals and assisted with any questions they might have regarding the formulation of their budgets.

Reporting

- During budget adoption, first and second interim and unaudited actuals, compiled the SACS file, updated validation tables, cleared the Technical Review Checklist, updated supplemental forms, including the Criteria and Standards, and submitted finalized forms to the Superintendent's office for board meetings and to the County.
- Completed reports for various grants and programs, including Federal Cash Management, Special Education expenditure reports, site and department spending and board reports.
- Pulled data and input information to complete reports such as the District's J-90, Con App, and School Accountability Report Cards (SARC).
- Worked closely with one of the District's consulting companies to create Actuarial Valuation reports on Retiree Health Benefit costs.
- Attended training to become a PeopleSoft query manager for the District in order to create custom reports that fit the District's needs.

Compliance

- Worked with various community interests and management to ensure funding for the LCAP was properly allocated and spent.
- Monitored revenue and expenditures to ensure the District's funds were being used efficiently and appropriately in our goal of supporting student achievement.
- Helped facilitate the District's yearly audit and acted as the liaison between the independent auditing firm and the District.
- Ensured the District was meeting state reporting requirements and complied with established GAAP and GASB regulations.
- Attended monthly SELPA meetings, compiled the District's SEMA and SEMB forms and completed the Excess Cost calculations at the end of the fiscal year.

Financial Responsibilities

- During year-end closing, worked with Accounts Payable and payroll to accrue costs. Calculated and input STRS on behalf, OPEB, Due To and Due From, and Indirect costs, assigned ending fund balances, and completed supplemental forms such as the CAT, CEA, ESMOE and GANN forms.

Aviles 2

- Calculated the cost of a 1% increase and step and column costs to aid in the District's negotiations with the two bargaining units. Also calculated the increased cost of PERS and STRS, benefits costs, SPED expenditures, and changes to salary schedules and the District's contributions for health insurance.
- Created a Profit and Loss statement for the Cafeteria Fund to help work towards mitigating future District contributions to the program.
- Maintained the District's asset and depreciation schedules.
- Performed bank reconciliations for the District's revolving cash, purchase card, ASB, and other accounts for the purpose of detecting discrepancies, resolving problems, and ensuring efficiency of operations.
- Regularly cleared suspense entries for revenue and expenditures.
- Closed the District's Deferred Maintenance Fund.
- Streamlined and maintained the District's chart of accounts.

Payroll and Human Resources

- Collaborated with Human Resources and the payroll department to develop and implement a new position control system. Created and updated positions, input and updated department budget tables, and made necessary budget transfers or allocations to ensure salaries were being correctly charged.
- Reviewed staffing requisitions to make sure positions were budgeted for, there were sufficient funds available, and to ensure no replacements were being brought in for positions that were not meant to be filled.
- Performed a monthly review of the District's payroll distribution report to ensure resources were being properly charged for staffing costs and to confirm stipends, benefits, and multiple components of pay were properly allocated to staff.
- Collaborated with a colleague in the Human Resources department to clean up stipend offerings and associated costs.
- Submitted data to a third party to confirm ACA eligibility for staff and worked closely with the Human Resources department and payroll to ensure special cases were handled properly.
- Compiled benefits information and worked with the County to put together, review, and distribute 1095-C forms to all employees.
- Created an outline of job responsibilities and important tasks and deadlines in an office-wide initiative to create desk manuals for current positions in the Business Office in an effort to help with new hire training and ensure seamless continuity in the event of promotions or transfers of staff.

**STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT**

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Aviles Michael Anthony

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

San Diego County

Division, Board, Department, District, if applicable

Your Position

Treasurer-Tax Collector

Treasurer-Tax Collector

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County

☒ County of San Diego

☐ City of

☐ Other

3. Type of Statement (Check at least one box)

☐ Annual: The period covered is January 1, 2024, through December 31, 2024.

☐ Leaving Office: Date Left / /
(Check one circle below.)

-or-

The period covered is / /, through December 31, 2024.

☐ The period covered is January 1, 2024, through the date of leaving office.

-or-

☐ Assuming Office: Date assumed / /

☐ The period covered is / /, through the date of leaving office.

☒ Candidate: Date of Election 09/18/2025 and office sought, if different than Part 1:

4. Schedule Summary (required)

► Total number of pages including this cover page: 7

Schedules attached

☒ Schedule A-1 - Investments - schedule attached

☒ Schedule C - Income, Loans, & Business Positions - schedule attached

☒ Schedule A-2 - Investments - schedule attached

☒ Schedule D - Income - Gifts - schedule attached

☒ Schedule B - Real Property - schedule attached

☒ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- ☐ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER

EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 09/18/2025
(month, day, year)

Signature

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM **700**

FAIR POLITICAL PRACTICES COMMISSION

Name

Michael Aviles

NAME OF BUSINESS ENTITY

NVIDIA

GENERAL DESCRIPTION OF THIS BUSINESS

Microchip company

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

06/06/24 06/13/24
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ /24 / /24
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ /24 / /24
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ /24 / /24
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ /24 / /24
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ /24 / /24
 ACQUIRED DISPOSED

Comments:

SCHEDULE A-2
Investments, Income, and Assets
of Business Entities/Trusts
(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
Name Michael Aviles

1. BUSINESS ENTITY OR TRUST	
Name _____	
Address (Business Address Acceptable) _____	
Check one <input type="checkbox"/> Trust, go to 2 <input type="checkbox"/> Business Entity, complete the box, then go to 2	
GENERAL DESCRIPTION OF THIS BUSINESS	
FAIR MARKET VALUE <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: _____/_____/24 ____/_____/24 ACQUIRED DISPOSED
NATURE OF INVESTMENT <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other _____	
YOUR BUSINESS POSITION _____	
2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)	
<input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000
3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.) <input type="checkbox"/> None or <input type="checkbox"/> Names listed below	
4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST	
Check one box: <input type="checkbox"/> INVESTMENT <input type="checkbox"/> REAL PROPERTY	
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property _____	
Description of Business Activity or City or Other Precise Location of Real Property _____	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: _____/_____/24 ____/_____/24 ACQUIRED DISPOSED
NATURE OF INTEREST <input type="checkbox"/> Property Ownership/Deed of Trust <input type="checkbox"/> Stock <input type="checkbox"/> Partnership <input type="checkbox"/> Leasehold _____ Yrs. remaining <input type="checkbox"/> Other _____	
<input type="checkbox"/> Check box if additional schedules reporting investments or real property are attached	

Comments: N/A

1. BUSINESS ENTITY OR TRUST	
Name _____	
Address (Business Address Acceptable) _____	
Check one <input type="checkbox"/> Trust, go to 2 <input type="checkbox"/> Business Entity, complete the box, then go to 2	
GENERAL DESCRIPTION OF THIS BUSINESS	
FAIR MARKET VALUE <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: _____/_____/24 ____/_____/24 ACQUIRED DISPOSED
NATURE OF INVESTMENT <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other _____	
YOUR BUSINESS POSITION _____	
2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)	
<input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000
3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.) <input type="checkbox"/> None or <input type="checkbox"/> Names listed below	
4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST	
Check one box: <input type="checkbox"/> INVESTMENT <input type="checkbox"/> REAL PROPERTY	
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property _____	
Description of Business Activity or City or Other Precise Location of Real Property _____	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: _____/_____/24 ____/_____/24 ACQUIRED DISPOSED
NATURE OF INTEREST <input type="checkbox"/> Property Ownership/Deed of Trust <input type="checkbox"/> Stock <input type="checkbox"/> Partnership <input type="checkbox"/> Leasehold _____ Yrs. remaining <input type="checkbox"/> Other _____	
<input type="checkbox"/> Check box if additional schedules reporting investments or real property are attached	

SCHEDULE B
Interests in Real Property
(Including Rental Income)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
Michael Aviles

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☐ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____
Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☐ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____
Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

☐ Guarantor, if applicable

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

☐ Guarantor, if applicable

Comments: N/A

SCHEDULE C
Income, Loans, & Business
Positions
(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
Name
Michael Aviles

▶ 1. INCOME RECEIVED	▶ 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME VCPUSD	NAME OF SOURCE OF INCOME
ADDRESS (Business Address Acceptable) 28751 Cole Grade Rd, Valley Center, CA 92082	ADDRESS (Business Address Acceptable)
BUSINESS ACTIVITY, IF ANY, OF SOURCE Public Education	BUSINESS ACTIVITY, IF ANY, OF SOURCE
YOUR BUSINESS POSITION Chief Business Officer	YOUR BUSINESS POSITION
GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> OVER \$100,000	GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input checked="" type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)	CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*	INTEREST RATE
_____	_____ % <input type="checkbox"/> None
ADDRESS (Business Address Acceptable)	TERM (Months/Years)
_____	_____
BUSINESS ACTIVITY, IF ANY, OF LENDER	SECURITY FOR LOAN
_____	<input type="checkbox"/> None <input type="checkbox"/> Personal residence
HIGHEST BALANCE DURING REPORTING PERIOD	<input type="checkbox"/> Real Property _____
<input type="checkbox"/> \$500 - \$1,000	Street address
<input type="checkbox"/> \$1,001 - \$10,000	_____
<input type="checkbox"/> \$10,001 - \$100,000	City
<input type="checkbox"/> OVER \$100,000	<input type="checkbox"/> Guarantor _____
	<input type="checkbox"/> Other _____
	(Describe)

Comments: _____

SCHEDULE D Income – Gifts

CALIFORNIA FORM **700**
FAIR POLITICAL PRACTICES COMMISSION

Name
Michael Aviles

<div>▶ NAME OF SOURCE (Not an Acronym)</div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> </table>	DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	___/___/___	\$ _____	_____	___/___/___	\$ _____	_____	___/___/___	\$ _____	_____	<div>▶ NAME OF SOURCE (Not an Acronym)</div> <div>ADDRESS (Business Address Acceptable)</div> <div>BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> <table> <tr> <th>DATE (mm/dd/yy)</th> <th>VALUE</th> <th>DESCRIPTION OF GIFT(S)</th> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> </table>	DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	___/___/___	\$ _____	_____	___/___/___	\$ _____	_____	___/___/___	\$ _____	_____
DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)																							
___/___/___	\$ _____	_____																							
___/___/___	\$ _____	_____																							
___/___/___	\$ _____	_____																							
DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)																							
___/___/___	\$ _____	_____																							
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___/___/___	\$ _____	_____																							
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DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)																							
___/___/___	\$ _____	_____																							
___/___/___	\$ _____	_____																							
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DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)																							
___/___/___	\$ _____	_____																							
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DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)																							
___/___/___	\$ _____	_____																							
___/___/___	\$ _____	_____																							
___/___/___	\$ _____	_____																							
DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)																							
___/___/___	\$ _____	_____																							
___/___/___	\$ _____	_____																							
___/___/___	\$ _____	_____																							

Comments: N/A

SCHEDULE E
Income – Gifts
Travel Payments, Advances,
and Reimbursements

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name Michael Aviles

- Mark either the gift or income box.
- Mark the "501(c)(3)" box for a travel payment received from a nonprofit 501(c)(3) organization or the "Speech" box if you made a speech or participated in a panel. Per Government Code Section 89506, these payments may not be subject to the gift limit. However, they may result in a disqualifying conflict of interest.
- For gifts of travel, provide the travel destination.

▶ NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

CITY AND STATE

☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): ____/____/____ - ____/____/____ AMT: \$_____
(If gift)

▶ MUST CHECK ONE: ☐ Gift -or- ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

CITY AND STATE

☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): ____/____/____ - ____/____/____ AMT: \$_____
(If gift)

▶ MUST CHECK ONE: ☐ Gift -or- ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

CITY AND STATE

☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): ____/____/____ - ____/____/____ AMT: \$_____
(If gift)

▶ MUST CHECK ONE: ☐ Gift -or- ☐ Income

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☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym)

ADDRESS (Business Address Acceptable)

CITY AND STATE

☐ 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): ____/____/____ - ____/____/____ AMT: \$_____
(If gift)

▶ MUST CHECK ONE: ☐ Gift -or- ☐ Income

☐ Made a Speech/Participated in a Panel

☐ Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

Comments: N/A

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Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

David

First Name

Baker

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at
www.sandiegocob.com or
PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD CLERK OF THE BOARD
2025 SEP 16 PM 12:43



Application Timeline

- | | |
|---------------------------|---|
| September 22, 2025 | Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon. |
| September 30, 2025 | Hearing on all applicants. Please plan to attend this meeting. |

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ Yes, I understand

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ Yes, I understand

A. Tell us About Yourself

First Name: David

Last Name: Baker

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Type:

Cell

Phone 2:

Type:

E-mail:

Have you lived at your current address for more than five years?

☐ Yes

☒ No

If no, please list your previous addresses on page 4.

**If you have not lived at your current address for more than five years, please list
your addresses for the past five (5) years:**

Date From: 2/1/2021 Date To: 11/26/2024

Street Address:

City:

State:

Zip Code:

Date From:

Date To:

Street Address:

City:

State:

Zip Code:

Date From:

Date To:

Street Address:

City:

State:

Zip Code:

Date From:

Date To:

Street Address:

City:

State:

Zip Code:

Date From:

Date To:

Street Address:

City:

State:

Zip Code:

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840):
Select all that apply and attach appropriate verification.
 - ☒ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

db

5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

Please see Attachment B.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

Please see Attachment C.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, **David Baker**

, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

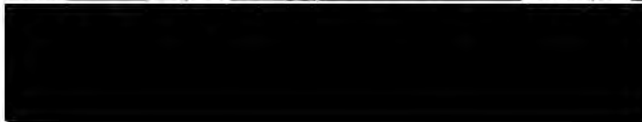
I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this **16** day of **September**, 2025, at **San Diego**, California.

Signature:



E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.

More than 30 years of experience in the private and public sector with proven financial, organizational acumen, leadership, communication and decision-making skills, with a passion to provide exceptional customer service, fairness and equitable outcomes.

PROFESSIONAL EXPERIENCE

COUNTY OF SAN DIEGO TREASURER-TAX COLLECTOR

2002 - Present

Chief Deputy – Treasurer-Tax Collector

Chief Deputy – Treasurer-Tax Collector	2018 - Present
Division Manager – Special Functions Division	2016 - 2018
Division Manager – Information Division	2011 - 2016
Division Manager – Financial Division	2009 - 2011
Assistant Manager – Financial Division	2007 - 2009
Deferred Compensation Coordinator	2005 - 2007
Senior Treasurer-Tax Collector	2003 - 2005
Treasurer-Tax Collector Specialist	2002 - 2003

- *Responsible for **more than \$9 billion in property tax billing and collections** (with a 99% collection rate, ranking among the highest in the state), customer service operations, payment processing, refund processing, financial adjustments, and all other specialty collection activities.*
- ***Oversight of the County's \$2.7 billion Deferred Compensation Program** and serving as a Fiduciary and a member of the Deferred Compensation Program's Investment Review Committee for more than 15 years.*
- *Interpreting and **applying Revenue and Taxation and Government Code**, and analyzing proposed legislation that may impact the Treasurer-Tax Collector and the County of San Diego.*
- *Responding to **County of San Diego Board of Supervisors and Chief Administrative Officer action requests**, coordinating cross-departmental initiatives, and acting in the absence of the County Treasurer-Tax Collector.*

SUNRISE CAPITAL INVESTMENT CORP. | Oceanside, CA

2001 - 2002

Principal

- *Managed delta neutral, volatility-driven stock option strategies seeking returns independent of market moves.*

CREDIT AGRICOLE | Japan

1999 - 2001

Director – International Structured Finance Group

- *Structured bond and equity investments for institutional clients; supported global capital markets operations for France's 10th largest bank by total assets.*

SOCIETE GENERALE | Japan and England

1992 - 1999

Deputy General Manager – Capital Markets Group

- *Structured bond and equity investments for institutional investors; supported comprehensive banking services in retail, corporate and investment banking for France's 19th largest bank by total assets.*

YAMAICHI SECURITIES, CO. LTD. | Japan

1990 - 1992

Financial Engineer – Syndication and Structured Finance Department

- *Developed structured bond investments for institutional and retail clients; contributed to operations at Japan's 3rd largest brokerage prior to merging with Merrill Lynch.*

EDUCATION

Masters, Business Administration | 2008

California State University (San Marcos, CA)

B.S., International Business and Economics | 1990

Sophia University

(Tokyo, Japan)

Attachment B - Experience & Qualifications

I have dedicated my nearly 23-year career to the County of San Diego Treasurer-Tax Collector's (TTC) department, serving the last seven as Chief Deputy. I began my career in 2002 as a TTC Specialist in the call center and customer service operations, and advanced through increasing levels of leadership and responsibility. Today I am responsible for all tax collection related operations including overseeing more than \$9 billion in collections, with a 99% collection rate that ranks among the highest in the state. I respond to requests from the Board of Supervisors and Chief Administrative Officer, coordinate cross-departmental initiatives and act accordingly in the absence of the County Treasurer-Tax Collector.

Additionally, I oversee the County's \$2.7 billion Deferred Compensation Program, serve as a Fiduciary, and have been a member of the Deferred Compensation Investment Review Committee for more than 15 years.

Prior to joining the County, I spent more than a decade in structured finance with international investment banks in Tokyo and London. I acquired expertise in investments and finance through structuring fixed income investment solutions for institutional clients. My responsibilities included pricing bond issuances by factoring in interest rates and currency exchanges to meet the cash flow, risk, and investment return demand of the client. I also coordinated with legal and compliance teams to complete documentation, settlements and safekeeping. This prepared me with experience to oversee management of the County's Investment Pool.

I hold a Bachelor of Science in International Business and Economics from Sophia University in Tokyo (1990) and an MBA from California State University San Marcos (2008). My graduate studies enhanced my knowledge in leadership, finance, operations, and analytics, and provided me with a strong foundation for effective decision-making and problem-solving.

Having a strong understanding of the Revenue and Taxation Codes enables me to ensure compliance with the laws governing our work and identify opportunities to optimize operations for public benefit. As Chief Deputy, I analyze legislation to determine the impact it might have on TTC, other County departments, taxpayers and the County as a whole.

TTC is preparing for the October 2025 launch of a new Integrated Property Tax System (IPTs), which will replace an aging Mainframe system. I serve as TTC's Executive Sponsor and am responsible for overseeing our department's Leads and Subject Matter Experts, and working to ensure the system's successful acceptance and implementation. In addition to IPTs, other critical changes will occur within both our payment processing operations and Deferred Compensation Program. This coming year will see a transformative change in TTC.

My leadership style is democratic and participative. I seek collaboration and input from staff and colleagues before finalizing decisions. I served as TTC's first Diversity and Inclusion Champion from program inception through April 2020; I prioritize fostering an inclusive and respectful workplace. Leadership will be especially critical in the coming year, and I am committed to a team-driven strategic effort to ensure smooth continuity and success.

Above all, I agree that the noblest motive is the public good.

Attachment C - Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

The role of the County Treasurer-Tax Collector's department (TTC) is critical and complex, uniquely responsible for the billing, collection and accounting of more than \$9 billion in property taxes, oversight of the \$2.7 billion Deferred Compensation Program, and management of the County's Investment Pool. This position also requires operational awareness, organizational acumen, a passion for public service, integrity, transparency, accountability, and a desire to seek equitable outcomes. All principles that guide my work every day.

Transformational change is coming to TTC. The anticipated implementation of the Integrated Property Tax System (IPTS) in October 2025 will replace the aging Mainframe system and bring significant changes to both TTC and the Auditor & Controller. Ensuring continuity of operations and strong staff support in the coming year will be vital and will prepare TTC for a new future. Having worked on the IPTS project for several years, and having served as the department's Executive Sponsor, I have a deeply vested interest in making sure it is successful; as Acting TTC I will be committed to nothing less. I will bring leadership and institutional knowledge to effectively evaluate and work with staff through implementation. As with any major system implementation, I anticipate we will identify areas for refinement and process improvement after launch. I believe success will require ongoing collaboration, communication and teamwork, not only within TTC, but across other County departments. A group effort is needed over the coming year to ensure we persevere and create even greater efficiencies and improvements.

This coming year will also bring change to TTC's payment processing operations, a critical component of tax collection. Following the January 2024 catastrophic flooding TTC experienced at the County Administration Center, I coordinated the relocation of payment processing equipment and staff members to the County Operations Center in Kearny Mesa to maintain operational continuity and mitigate risk during crucial collections period. To further safeguard this function, I arranged for a permanent relocation to a new space within the SDCERA building in Mission Valley, planned for the first quarter of 2026. The move will require careful coordination given the specialized equipment involved, as well as strong support for staff and diligent oversight into possible disruptions to collection operations. Additionally, TTC will implement a new mail remittance processing application in May 2026. With its complex structure, this implementation will require significant analysis and testing before going live. My priority will be supporting our incredible staff and protecting the integrity, continuity and efficiency of our collections and service to the public.

TTC recently completed a Request for Proposal to select a new recordkeeper for the \$2.7 billion Deferred Compensation Program. The Program is a major component in our County employees' retirement planning, affecting more than 30,000 current and retired employees. A transition to a new service provider is anticipated by the end of the year. As Acting TTC, I will ensure clear and transparent communication on the transition so current employees and retirees remain

educated, confident and supported by the County's Deferred Compensation Program. Under my leadership the Program has received multiple leadership awards from the National Association of Government Defined Contribution Administrators (NAGDCA), an Eddy Award from Pension's and Investment Magazine, and a Best in Category Award for the National Association of Counties (NACo) Employment and Training category.

As a fiduciary for the Deferred Compensation Program, I have participated in the selection of investment options, managed program costs, ensured legal compliance, and administered the plans. I have unique insight into the complexities of overseeing multi-billion dollar plans that provide benefits to generations of County employees and their families. As a result of recent changes to the plan's investment line-up and aforementioned recordkeeper, plan participants will save more than \$10 million annually, ensuring the long-term viability of the Program. This experience prepares me for the Treasurer-Tax Collector's mandated responsibility to sit on the SDCERA Board of Retirement. As a member of SDCERA of more than 20 years, I have a personal interest in the responsible stewardship of the \$18.7 billion SDCERA pension fund and I have the experience to serve in this important role.

The TTC manages the County's Investment Pool. With my extensive background in structured finance, I will work closely with the Chief Deputy and seasoned investment officers to continue successfully meeting the primary objectives of safety, liquidity and return on behalf of Pool participants, while maintaining risk management as an integral part of the investment policy and the County Treasury Oversight Committee.

The year ahead will bring numerous changes and the future is bright. I will work to continuously improve our easy online payment and web services that the public values, while maintaining excellent customer service in our call center, online presence and in-person touch points. The TTC department will also focus on a number of goals including E-billing and eliminating mailed bills, implementing a Customer Relationship Management (CRM) system for improved customer service and greater efficiencies for our staff and the public, and provide ongoing value added financial education to local agencies and Deferred Compensation Program participants to assist with their retirement planning.

Given the transformational change coming to TTC, I believe the most important thing a leader can do is prioritize transparent and open communication, lead with empathy and emotional intelligence, and secure and empower managers and staff. I believe this will enable the department to meet its goals, ensure we value the team's contributions, understand the day-to-day experiences we face, and do it all with a heart of being "of service" to the public we serve.

On a personal note, serving as the Acting TTC would be an honor and bring full circle my service to the public, department, and the County, and I believe will provide inspiration to staff that it is possible in the County to work your way "from the bottom up."

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
BAKER DAVID A

1. Office, Agency, or Court

Agency Name (Do not use acronyms)
COUNTY OF SAN DIEGO

Division, Board, Department, District, if applicable

TREASURER-TAX COLLECTOR

Your Position

CHIEF DEPUTY

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County

☒ County of SAN DIEGO

☐ City of

☐ Other

3. Type of Statement (Check at least one box)

☐ Annual: The period covered is January 1, 2024, through
December 31, 2024.

☐ Leaving Office: Date Left / /
(Check one circle below.)

-or-

The period covered is / / , through
December 31, 2024.

☐ The period covered is January 1, 2024, through the date of
leaving office.

-or-

☐ Assuming Office: Date assumed / /

☐ The period covered is / / , through
the date of leaving office.

☒ Candidate: Date of Election 9/30/2025 and office sought, if different than Part 1: ACTING TREASURER TAX COLLECTOR

4. Schedule Summary (required)

► Total number of pages including this cover page: 1

Schedules attached

☐ Schedule A-1 - Investments - schedule attached

☐ Schedule C - Income, Loans, & Business Positions - schedule attached

☐ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☐ Schedule B - Real Property - schedule attached

☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- ☒ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

1600 PACIFIC HIGHWAY, RM 162

SAN DIEGO

CA

92101

DAYTIME TELEPHONE NUMBER

(619) 531-5711

EMAIL ADDRESS

DAVID.BAKER@SDCOUNTY.CA.GOV

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 9/16/25

(month, day, year)

Signature

(File the originally signed paper statement with your filing official.)

Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

Robert

First Name

Brown

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD CLERK OF THE BOARD
2025 SEP 22 AM 11:30



Potter, Andrew

To: Robert Brown
Subject: RE: [External] Re: WITHDRAWING FROM TREASURER TAX COLLECTOR CONSIDERATION
- Application for Treasurer-Tax Collector Appointment – Next Steps

From: Robert Brown [REDACTED]
Sent: Tuesday, September 23, 2025 9:13 AM
To: Potter, Andrew <Andrew.Potter@sdcounty.ca.gov>
Subject: [External] Re: WITHDRAWING FROM TREASURER TAX COLLECTOR CONSIDERATION - Application for Treasurer-Tax Collector Appointment – Next Steps

Andrew,

I hope this message finds you well. Following our recent discussion, I am writing to formally announce my withdrawal from the consideration for San Diego County's Treasurer-Tax Collector position.

The significance of this role for the citizens of San Diego County cannot be overstated, and I believe it is paramount that we ensure the best possible leadership. In this light, I am wholeheartedly endorsing Mr. David Baker for the position.

His extensive credentials and proven track record will facilitate a smooth transition, ensuring that the vital processes and programs currently in place continue without disruption.

My commitment to the well-being of our fellow San Diego County residents remains steadfast, and I genuinely believe that Mr. Baker is the right choice to uphold that commitment.

Thank you for your understanding.

Warmest regards,

Dr. R. Lee (Bob) Brown
[REDACTED]
[REDACTED]

Application Timeline

- | | |
|---------------------------|---|
| September 22, 2025 | Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon. |
| September 30, 2025 | Hearing on all applicants. Please plan to attend this meeting. |

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ **Yes, I understand**

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ **Yes, I understand**

A. Tell us About Yourself

First Name: **Robert**

Last Name: **Brown**

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Type:

Mobile

Phone 2:

Type:

Home

E-mail:

Have you lived at your current address for more than five years?

☒ **Yes**

☐ **No**

If no, please list your previous addresses on page 4.

If you have not lived at your current address for more than five years, please list your addresses for the past five (5) years:

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840):
Select all that apply and attach appropriate verification.
 - ☒ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

I am a very trusted community servant and advocate with extensive experience in group psycho-dynamics, co-determination, cross-cultural competency, auditing, evaluating, cost-containment, insurance, pension plans, actuarial systems, media relations, campaigns, inter personal intelligence, forecasting, projections, intra personal intelligence, and analytics. I led statewide university systems operational functions.

I authored Workers' Compensation and Cyber-Liability insurance policies during a very challenging hard market period that has saved the largest California State University system hundred of million dollars. Various forgrms or renderings of the same insurance policies are currently used through out the U.S.

I designed programs and policies used to enhance relations, reduce conflicts and prevent litigation that are use by several largest companies in the United States.

I want to drastically serve our community during a very contentious and divisive period in our world, nation and state in a position that I hope could be used to bring people together.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

I have the background, trust, education and experience in the public sector, I believe has prepared me to do a good job as Tax Assessor!

Serving in public office is both a privilege and a responsibility, one that requires an unwavering commitment to the people.

Transparency ensures that decisions are made openly, with honesty and accountability guiding every action. When leaders are clear about their goals, policies, and the reasoning behind their choices, they earn the trust of their constituents. This trust is the foundation of democracy, allowing communities to feel confident that their voices matter and that public resources are being used responsibly.

Collaboration is equally vital, as no single leader has all the answers. Effective governance depends on bringing diverse voices to the table, citizens, community organizations, experts, and fellow policymakers. By actively listening and working together, leaders can craft solutions that reflect the needs and aspirations of the people they serve. Collaborative leadership also fosters innovation, because it allows for the blending of different perspectives and experiences that enrich decision-making.

Ultimately, the measure of public service is not in individual accolades but in the well-being of the community. Leaders who govern transparently and collaboratively create a culture of inclusion, fairness, and shared responsibility. This approach strengthens the social fabric, ensuring that policies are not imposed from above but built collectively with those most affected. In doing so, public officials not only fulfill their duty but also help build a legacy of trust and progress for future generations.

Thank you

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, Dr. Robert Lee Brown, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 22 day of September, 2025, at San Diego, California.

Signature: 

E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.

Dr. Robert Lee Brown

Auditor | Group Psychodynamics | Law Enforcement Reforms | Mediator-Alternate Conflict Resolution-
Litigation Prevention | Policy Architect | Government Relations Director | Organizational Effectiveness
| Executive Director Program Management | Community Relations Builder
| Defender of Equity, Safety & Public Trust |

Nationally recognized leader in public sector with 20+ years of experience in alternate conflict resolution-mediation, law enforcement oversight, risk management, and community trust building. Proven record of leading/managing multimillion-dollar public systems, and serving as a liaison to commissions, mayors, city councils, the public and leading public safety reform initiatives. Board member of multiple oversight commissions, advocate for transparency, and architect of wellness and accountability programs adopted nationally. Proven record of authoring enterprise-wide reforms, leading risk and HR operations for institutions impacting over half a million people and advising on multi-billion-dollar civic development projects.

STRATEGIC SKILLS

- | | |
|---------------------------------------|---|
| ✓ Human Resources Leadership | ✓ Enterprise Risk Management & Crisis Solutions |
| ✓ Public Safety Reforms | ✓ Group Psychodynamics Systems |
| ✓ Conflict Resolution/Negotiations | ✓ Auditing/Analytics/Evaluator/Cost Containment |
| ✓ Litigation Prevention | ✓ Law Enforcement Oversight, Reform & Wellness |
| ✓ Cross-Cultural Counseling | ✓ Corporate Governance |
| ✓ Regulatory Compliance | ✓ Workplace Energy/Active Engagement |
| ✓ Enhancing Efficiency & Productivity | ✓ Policy Design & Reforms |
| ✓ Organizational Effectiveness | ✓ Executive Coaching |
| ✓ Media, HR & Risk Management | ✓ Problem Identifications & Solutions |
| ✓ Budget Development & Management | ✓ Research & Investigations |
| ✓ Co-Determined-Collective Bargaining | ✓ Threat Assessment |

PROFESSIONAL MISSION

"To champion a future-forward public service ethos that prioritizes co-determination, dignity, safety, and opportunity for every American—through policy innovation, inclusive leadership, and strategic civic partnerships."

EXECUTIVE EXPERIENCE

**Executive Program Manager – Contract Faculty | SDSU Graduate Homeland Security Department
San Diego, CA | 2021–Present**

Lead multiple public agency audits/evaluations, law enforcement reforms leadership involving municipal entities, and public institutions while enhancing compliance, accountability, and risk mitigation. Provide oversight policy design and community-based engagement strategies to improve transparency and safety across local and state systems.

- Perform institutional-departmental audits, leadership competency evaluations, crises-emergency response, quality assurance, and cyber risk policy designs for municipal, state & federal governmental entities, energy companies, biotech firms, media, defense, medical, research, and public institutions. Able to navigate complex political environments while building broad coalitions.
- Provided strategic quality assurance auditing for various entities, including government agencies, universities, medical systems, law enforcement, media, labor organizations, biotech, defense, research, non-profits, re-insurance, and schools, focusing on compliance, morale, and productivity.
- Collaborated with public safety-law enforcement agencies and community boards to assess public trust and recommended reforms.
- Developed regulatory and quality assurance frameworks for use in civilian safety and public transparency initiatives.

Senior Program Manager | Chancellor's Office, University of California
La Jolla, CA | 2017–2021

Oversaw risk and community engagement for a \$15B nationally recognized university redevelopment plan including public transportation and law enforcement coordination. Acted as equity advisor on stakeholder relations and urban planning.

- Directed quality assurance, community relations and risk oversight for a \$15B campus expansion, which included a 15.4-mile light rail development project with major public impact.
- Advised university leadership, public officials and civic stakeholders, on strategic initiatives designed ensure co-determined, equitable redevelopment, cost contained, timely project delivery.

Vice President of HR & Risk Management | CSU Chancellor's Office & SDSU Research Foundation
San Diego & Long Beach, CA | 2002–2016

- Led CSU's State-Wide-Risk Management Authority (CSURMA-AORMA), and Quality Assurance programs supporting 23 campuses, 80 auxiliary-business entities, 500,000 students, and 50,000 faculty.
- Member of State of California's Office of Emergency Services. Oversaw law enforcement reform initiatives across 23 university police departments.
- Simultaneously directed enterprise HR and risk management, emergency response systems for a research foundation with 5,000 employees, 1,100+ global research initiatives that included media, medical operations.

EDUCATION

Doctorate in Leadership Studies-Group Psychodynamics, University of San Diego, 2007

M.A. in Cross-Cultural Counseling, San Diego State University, 1996

POLICY IMPACT & PUBLICATIONS

- Served as a lecturer on *graduate clinical mental health counseling* on behalf of Dr. Ronn Johnson, Chair of the University of San Diego's Graduate Mental Health Counseling Program (2007-2010).
- Research/Lecture Mediation, Alternate Dispute and Conflict Resolution, *Indirect Costs of Negligent, Clinical, Educational, and Managerial Supervision*. (2007-current)
- Architect of CSU systemwide policies: Self-Insured Workers' Compensation Insurance policy, Cyber Liability Insurance Program, Litigation Prevention Program, and Large Event Risk Planning.
- Lead the team that authored the San Diego Police Department's Wellness Program adopted regionally leading to tens of millions of annual savings. (2009).
- The subject of a Doctoral Dissertation on HR Leadership (2007). Dr. Mary Jesko.
- Brown, R. L. (1998). *Using Mediation to Minimize or Prevent Employee Lawsuits: Litigation Prevention*, paper presented at RIMS Conference, Atlanta, Georgia.
- Johnson, R. with Brown, R. L. (2012). *Forensic Psychological Considerations for Conceptualizing the Mindset of a Terrorist*. Paper presented at the Annual Meeting of the Academy of Criminal Justice Science conference. New York, New York.
- Johnson, R. & Brown, R.L. (2011). *Preparing for Forensic Psychology Cases: Art and Science*. Paper presented at the 19th Annual Rose Tyson Forensic Science Conference, San Diego, California.

CIVIC & COMMUNITY LEADERSHIP

- Board Member: SD County's Citizens Law Enforcement Review Board (CLERB), San Diego County Urban League-Board of Directors (Civic Engagement), City of San Diego Privacy Advisory Board, SD Humane Society.
President/VP Roles: USC Football Alumni Association, Star-PAL (Police Athletic League), McGill School of Success K–5 Charter School Board. San Diego County Head Start, Violence & Trauma Institute, County Office of Education. Coast Guard Auxiliary- Flotilla-11, Association of Threat Assessment Professionals

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Brown Robert Lee

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

San Diego County

Division, Board, Department, District, if applicable

Your Position

TREASURER - TAX COLLECTOR
Tax Assessor Temporary

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: San Diego County

Position:

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County

☒ County of San Diego

☐ City of

☐ Other

3. Type of Statement (Check at least one box)

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☐ Leaving Office: Date Left ____/____/____
(Check one circle below.)

-or-

The period covered is ____/____/____, through
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☐ The period covered is January 1, 2024, through the date of
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-or-

☐ Assuming Office: Date assumed 11 / 15 / 2025

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☒ Candidate: Date of Election 9/30/25 and office sought, if different than Part 1: _____

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► Total number of pages including this cover page: _____

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☐ Schedule B - Real Property - schedule attached

☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- ☒ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER

EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 09/22/2025

(month, day, year)

(Signature of Filer) (Signature of Filing Official)

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make sure your
application is complete.

Lawrence (Larry)

First Name

Cohen

Last Name

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Application Timeline

September 22, 2025	Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon.
September 30, 2025	Hearing on all applicants. Please plan to attend this meeting.

Important Things to Know

-
- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
 - Answer the questions to the best of your ability.
 - You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ **Yes, I understand**

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ **Yes, I understand**

A. Tell us About Yourself

First Name: Lawrence (Larry)

Last Name: Cohen

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Type:

Personal Cell

Phone 2:

Type:

E-mail:

Have you lived at your current address for more than five years?

☒ Yes

☐ No

If no, please list your previous addresses on page 4.

If you have not lived at your current address for more than five years, please list your addresses for the past five (5) years:

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840):
Select all that apply and attach appropriate verification.
 - ☐ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

TE.

5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

I believe I am uniquely qualified to serve as San Diego County Treasurer-Tax Collector (SDTCC) possessing both private sector experience, where I managed multi-million-dollar budgets and hundreds of employees for Fortune 100 corporations, and public sector experience, where I've served for more than 5 years as a senior advisor to a member of the U.S. Congress House Financial Services Committee, which oversees banking, pensions and federal securities legislation.

The SDTCC collects more than \$9.1 billion in annual property tax payments and manages an investment pool ranging between \$10.2 and \$18.8 billion annually. This office requires a unique blend of financial acumen, government expertise, and proven leadership capacity to oversee a staff of over 170+ employees while ensuring transparency, efficiency, and fiscal responsibility.

I hold a Masters of Business Administration (MBA), where I received formal training in finance and management - skills central to the SDTCC's mission of maximizing returns while safeguarding taxpayer dollars. I know how to evaluate balance sheets, assess risk-versus-reward trade-offs, and apply disciplined strategies to optimize return on investment (ROI).

In the private sector at Millipore Sigma (a division Merck KGaA of Germany), I managed a \$30 million business line and led teams of account managers, scientists, and specialists across North America. I was responsible for profit and loss performance, investment strategies, and contract negotiations while driving innovation in a competitive, highly regulated market. I managed budgets and consistently achieved revenue and market growth goals. These roles sharpened my ability to lead large teams, maximize organizational efficiency, and achieve measurable financial outcomes.

At the federal level, I serve as Chief of Staff and senior advisor to Congressman Juan Vargas, who sits on the House Financial Services Committee (HFSC). The HFSC is responsible for regulating pensions, financial institutions, and a broad swath of the US economy. As Chief of Staff, I have helped to support a Member of Congress as he has worked on legislation to protect pensions, strengthen capital markets, and advance Environmental, Social Governance (ESG) initiatives. I supported him as he helped to pass legislation, including the American Rescue Plan, which stabilized multi-employer pension funds and safeguarded retirement security for over one million Americans.

In addition, I supported the member in pursuing his priorities, including leading the Freedom to Invest in a Sustainable Future Act and the Environmentally Sustainable Growth Act, which would expand the use of Environmental, Social, and Governance (ESG) factors in institutional investment practices. This work has given me a deep insight into the interplay between finance, regulation, and long-term fiduciary responsibility—skills directly relevant to managing San Diego's investment pool with prudence and foresight.

In sum, my MBA training, work advising a Member of the House Financial Services Committee, and proven private sector record managing multimillion-dollar budgets and large teams uniquely qualify me to lead the San Diego County Treasurer-Tax Collector's office. I bring the vision to safeguard taxpayer funds, the financial discipline to maximize returns, and the leadership skills to direct a talented workforce in service of the County's residents.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

My vision for the office of San Diego County Treasurer-Tax Collector (TTC) is rooted in the traditions of customer service with its principal customers being the taxpayers of the County of San Diego, whose taxes we collect and disburse, and the thousands of current and retired employees whose pensions we oversee.

In addition, the TTC employs a highly dedicated and hardworking staff and it will be my job to ensure their workplace is nurturing and supportive, and that we give due difference to their ideas, insights and suggestions on how the County can do better.

The office has long upheld excellence in financial management; I intend to maintain that strength while expanding public access and equity. This includes leveraging technology to allow residents to pay taxes securely via mobile devices, access bills in a self-service format, and benefit from deferred payment options that can provide relief to families—particularly in working class communities—who may fall behind on their tax obligations. By modernizing service delivery, we can improve customer satisfaction while enhancing efficiency and transparency.

I see opportunities to connect the Treasurer's responsibilities to broader community benefits. In partnership with the San Diego County Employees Retirement Association (SDCERA), we can explore long-term, prudent investments that generate strong returns while strengthening our local economy. For example, leveraging the County's lease-back bond capacity to develop workforce housing would not only provide a dedicated revenue stream for bond repayment but also address a critical community need. Such strategies align with fiduciary obligations while creating a lasting impact.

In the first 90 days of my tenure, I would like to implement four programs that other counties around the country have moved forward with. I would like to see a Property Tax Postponement Program for Senior's and those with a Disability. I also want to put into motion a plan that mimics Rent Subsidy's, but in this case, it would be for Property Taxes. In addition, I envision us incorporating two policy's, one that would ask for an 80% payment while appealing tax disagreement versus a 100% payment, and the second which would call for partial payments versus full payments due to a financial hardship.

Finally, as a member of SDCERA, I want to use my Environmental Social Governance (ESG) experience in Congress to help increase Shareholder Voice and Advocacy, in reviewing, screening and divesting of assets that fall below performance expectations. This Shared Voice and Advocacy can also help us to increase our investments in minority businesses and relevant communities while maintaining excellent returns without compromising fiduciary responsibilities.

I feel that my vision, coupled with my federal pension and ESG policy experience, private sector leadership, and deep knowledge of government finance position me to serve San Diego County effectively as Treasurer-Tax Collector. I am committed to preserving the office's record of excellence while driving innovation that expands access, builds equity, and strengthens our community for generations to come.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, Lawrence (Larry) Cohen, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 19 day of September, 2025, at SAN DIEGO, California.

Signature: 

E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.

Strayer University Jack Welch Management Institute

*By the virtue of authority of the Board of Trustees and the
recommendation of the Faculty
has conferred upon*

Lawrence Douglas Cohen

the Degree of

Master of Business Administration

*with all the rights, honors, and privileges thereto pertaining.
In witness whereof, this degree is granted bearing the seal of
Strayer University, Washington, D.C.*

Given this twentieth day of December in the year two thousand and twenty-one.




Mary Carr, Dean



Strayer University

The

Jack Welch Management Institute

It is hereby certified that

Lawrence Douglas Cohen

has been granted the degree of


Master of Business Administration

with Welch Scholar Distinction

with all the rights, honors, and privileges thereto pertaining.

Given in the City of Washington, D.C., December 20, 2021.




Mary Carr, Dean

PROFESSIONAL EXPERIENCE
(Previous 10 Years)

Chief Of Staff

U.S. House of Representatives, Washington, D.C. - Congressman Juan Vargas (CA-52)

Apr 2020 – Present

- Served as Chief Advisor to Member of the Financial Services Committee (FSC), co-founder of the Environmental Social Governance Caucus (ESG), and Ranking Member of the U.S. House Task Force on Monetary Policy, which has jurisdiction over issues including pensions, capital markets, and SEC rules & regulations.
- Advised the member on all issues that come before Congress, including H.R. 1319 (The American Rescue Plan) which included provisions related to the Pension Benefit Guarantee Corporation (PBGC) and the Special Financial Assistance Program (SFA), which helped over 1.2 million retirees and beneficiaries.
- Advised the Member on strategy, including on priorities such as H.R. 1119, The Freedom to Invest in Sustainable Future Act which would allow pensions to use ESG Factors when Investing.
- Oversaw policy staff efforts to pass H.R. 4759, – The *Environmentally Sustainable Growth Act of 2023*, to require issuers of securities (public companies) to include annual environmental, social, and governance (ESG) metrics in their filings to shareholders.
- Develops and Manages Objectives, Strategies, and Operating Plans for the Washington D.C. and San Diego offices.
- Coordinates and directs all activities with the U.S. House Leadership, the U.S. Senate, and the White House.
- Oversees the Office Budget (\$2M per year) and coordinates all activities with State and Local Government Leaders / Agencies as required.

Senior Business Development Manager & Sales Director

Millipore Sigma – a division of Merck KGaA, Darmstadt, Germany

October 2015 – April 2020

- Supervised and managed group of ten Account Managers and 20 Indirect Scientists, GMP Technical-Manufacturer Specialists, as well as Protein Stabilization Experts in Western North America.
- Managed P/L, Investment, and ROI of \$40M GMP chemicals, products, and business services to Pharmaceutical, Biotech, Academic, and R&D Customers.
- Reviewed, modified, and managed growth plans to ensure corporate revenue targets were met while protecting key balance sheet indicators.
- Negotiated large, complex contract discussions, including customer proposals operating in a complex regulatory environment in multiple countries.
- Managed a yearly Operational Budget in excess of \$2 million per year.

EDUCATION

Masters in Business Administration, Strayer University, Washington D.C., 2021

Bachelor of Arts Degree, Political Science, University of California at San Diego, 1992

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Cohen Lawrence (Larry) Douglas

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

County of San Diego

Division, Board, Department, District, if applicable

SD Treasurer Tax Collector

Your Position

Candidate for Appointment

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County

☒ County of San Diego

☐ City of

☐ Other

3. Type of Statement (Check at least one box)

☒ Annual: The period covered is January 1, 2024, through
December 31, 2024.

-or-

The period covered is / / , through
December 31, 2024.

☐ Leaving Office: Date Left / /
(Check one circle below.)

☐ The period covered is January 1, 2024, through the date of
leaving office.

-or-

The period covered is / / , through
the date of leaving office.

☐ Assuming Office: Date assumed / /

Candidate: Date of Election 9-30-25 and office sought, if different than Part 1:

4. Schedule Summary (required)

► Total number of pages including this cover page:

Schedules attached

☒ Schedule A-1 - Investments - schedule attached

☒ Schedule C - Income, Loans, & Business Positions - schedule attached

☒ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☐ Schedule B - Real Property - schedule attached

☒ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- ☐ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed September 19, 2025

(month, day, year)

Signature

(File the originally signed paper statement with your filing official.)

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM **700**

FAIR POLITICAL PRACTICES COMMISSION

Name

NAME OF BUSINESS ENTITY

Captive Entertainment LLC

GENERAL DESCRIPTION OF THIS BUSINESS

Media Production Company

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock ☒ Other Capital contribution
(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

10/12/24 ////24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock ☐ Other _____
(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

////24 ////24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock ☐ Other _____
(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

////24 ////24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock ☐ Other _____
(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

////24 ////24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock ☐ Other _____
(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

////24 ////24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock ☐ Other _____
(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

////24 ////24
ACQUIRED DISPOSED

Comments:

SCHEDULE A-2
Investments, Income, and Assets
of Business Entities/Trusts
(Ownership Interest is 10% or Greater)

CALIFORNIA FORM **700**

FAIR POLITICAL PRACTICES COMMISSION

Name

► 1. BUSINESS ENTITY OR TRUST

Cardiff Reef LLC

Name

1649 Amante Court, Carlsbad, CA 92011

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☒ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

Real Estate / LLC

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

☐ \$0 - \$1,999

☐ \$2,000 - \$10,000

☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000

☒ Over \$1,000,000

 / / 24

ACQUIRED

 / / 24

DISPOSED

NATURE OF INVESTMENT

☐ Partnership

☐ Sole Proprietorship

☐ Real Estate LLC

Other

YOUR BUSINESS POSITION Owner

► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

☐ \$0 - \$499

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☒ OVER \$100,000

► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

☒ None or ☐ Names listed below

► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT

☒ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Parcel # 261-061-37-00

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

☐ \$2,000 - \$10,000

☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000

☐ Over \$1,000,000

 / / 24

ACQUIRED

 / / 24

DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust

☐ Stock

☐ Partnership

☐ Leasehold
Yrs. remaining

☐ Other

☐ Check box if additional schedules reporting investments or real property are attached

► 1. BUSINESS ENTITY OR TRUST

Cohen Revocable Trust

Name

1649 Amante Court, Carlsbad, CA 92011

Address (Business Address Acceptable)

Check one

☒ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

☐ \$0 - \$1,999

☐ \$2,000 - \$10,000

☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000

☒ Over \$1,000,000

 / / 24

ACQUIRED

 / / 24

DISPOSED

NATURE OF INVESTMENT

☐ Partnership

☐ Sole Proprietorship

☐

Other

YOUR BUSINESS POSITION

► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

☒ \$0 - \$499

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

☒ None or ☐ Names listed below

► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT

☐ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

☐ \$2,000 - \$10,000

☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000

☐ Over \$1,000,000

 / / 24

ACQUIRED

 / / 24

DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust

☐ Stock

☐ Partnership

☐ Leasehold
Yrs. remaining

☐ Other

☐ Check box if additional schedules reporting investments or real property are attached

Comments:

SCHEDULE C
Income, Loans, & Business
Positions
(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name

▶ 1. INCOME RECEIVED	▶ 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME <u>The Familie V2</u>	NAME OF SOURCE OF INCOME <u>ProperBrand</u>
ADDRESS (Business Address Acceptable) <u>2121 New Castle Avenue, Encinitas, CA 92007</u>	ADDRESS (Business Address Acceptable) <u>2121 New Castle Avenue, Encinitas, CA 92007</u>
BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Agency</u>	BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Marketing</u>
YOUR BUSINESS POSITION <u>n/a</u>	YOUR BUSINESS POSITION <u>n/a</u>
GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> OVER \$100,000	GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input checked="" type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input checked="" type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)	CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input checked="" type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*	INTEREST RATE	TERM (Months/Years)
_____	_____% <input type="checkbox"/> None	_____
ADDRESS (Business Address Acceptable)		

BUSINESS ACTIVITY, IF ANY, OF LENDER	SECURITY FOR LOAN	
_____	<input type="checkbox"/> None <input type="checkbox"/> Personal residence	
HIGHEST BALANCE DURING REPORTING PERIOD	<input type="checkbox"/> Real Property _____	Street address
<input type="checkbox"/> \$500 - \$1,000		City
<input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> Guarantor _____	
<input type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> Other _____	(Describe)
<input type="checkbox"/> OVER \$100,000		

Comments: Additional rental income on Attachment

SCHEDULE E
Income – Gifts
Travel Payments, Advances,
and Reimbursements

CALIFORNIA FORM 700 <small>FAIR POLITICAL PRACTICES COMMISSION</small>
Name _____

- Mark either the gift or income box.
- Mark the "501(c)(3)" box for a travel payment received from a nonprofit 501(c)(3) organization or the "Speech" box if you made a speech or participated in a panel. Per Government Code Section 89506, these payments may not be subject to the gift limit. However, they may result in a disqualifying conflict of interest.
- For gifts of travel, provide the travel destination.

▶ NAME OF SOURCE (Not an Acronym) <u>The Sultanate of Oman</u>
ADDRESS (Business Address Acceptable) <u>2535 Belmont Road NW</u>
CITY AND STATE <u>Washington, DC</u>
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE
DATE(S): <u>05/25/24</u> - <u>06/02/24</u> AMT: \$ <u>unknown</u> <small>(If gift)</small>
▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input type="checkbox"/> Income
<input type="checkbox"/> Made a Speech/Participated in a Panel
<input checked="" type="checkbox"/> Other - Provide Description <u>Congressional staff travel under Section 108A of the Mutual Educational and Cultural Exchange Act of 1951</u>
▶ If Gift, Provide Travel Destination <u>Muscat, Oman</u>

▶ NAME OF SOURCE (Not an Acronym)
ADDRESS (Business Address Acceptable)
CITY AND STATE
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE
DATE(S): ____/____/____ - ____/____/____ AMT: \$ ____ <small>(If gift)</small>
▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input type="checkbox"/> Income
<input type="checkbox"/> Made a Speech/Participated in a Panel
<input type="checkbox"/> Other - Provide Description _____
▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym)
ADDRESS (Business Address Acceptable)
CITY AND STATE
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE
DATE(S): ____/____/____ - ____/____/____ AMT: \$ ____ <small>(If gift)</small>
▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input type="checkbox"/> Income
<input type="checkbox"/> Made a Speech/Participated in a Panel
<input type="checkbox"/> Other - Provide Description _____
▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE (Not an Acronym)
ADDRESS (Business Address Acceptable)
CITY AND STATE
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE
DATE(S): ____/____/____ - ____/____/____ AMT: \$ ____ <small>(If gift)</small>
▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input type="checkbox"/> Income
<input type="checkbox"/> Made a Speech/Participated in a Panel
<input type="checkbox"/> Other - Provide Description _____
▶ If Gift, Provide Travel Destination _____

Comments: _____

SCHEDULE C
Attachment

CALIFORNIA FORM FAIR POLITICAL PRACTICES COMMISSION Name: Lawrence Cohen	700
--	------------

LIST OF REPORTABLE SINGLE SOURCES OF INCOME OF \$10,000 OR MORE

NAME OF SOURCE	ADDRESS OF SOURCE	BUSINESS ACTIVITY, IF ANY	YOUR BUSINESS POSITION	GROSS INCOME RECEIVED*	CONSIDERATION FOR WHICH INCOME WAS RECEIVED* (if "other," describe)
VYRTU	2121 New Castle Avenue, Encinitas, CA 92007	Wellness	n/a	\$1001-\$10,000	Rental Income
Brown & Winters	2121 New Castle Avenue, Encinitas, CA 92007	Law Firm	n/a	\$1001-\$10,000	Rental Income
Krista Spence LLC	2121 New Castle Avenue, Encinitas, CA 92007	Wellness	n/a	\$1001-\$10,000	Rental Income
Kat Beauty LLC	2121 New Castle Avenue, Encinitas, CA 92007	Wellness	n/a	\$1001-\$10,000	Rental Income
Zachary Gutroff	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Nicole Wright	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Brittany Rothheim	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Matthew Lewis	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Paul Deutz	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Rob LaBreche	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Jamaica Winship	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Diandra Bucciarelli	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Elizabeth Casciari	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Daniel Pinkus	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Stephanie Schorno	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Matthew Steiger	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Patrick Daly	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income
Kendal Prince	2121 New Castle Avenue, Encinitas, CA 92007	n/a	n/a	\$1001-\$10,000	Rental Income

Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

Carrilynn

First Name

Ford

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD CLERK OF THE BOARD
2025 SEP 19 PM 1:48



Application Timeline

- September 22, 2025** Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon.
- September 30, 2025** Hearing on all applicants. Please plan to attend this meeting.

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ Yes, I understand

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ Yes, I understand

A. Tell us About Yourself

First Name: Carrilynn

Last Name: Ford

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Type: cell

Phone 2:

Type:

E-mail:

Have you lived at your current address for more than five years?

☒ Yes ☐ No

If no, please list your previous addresses on page 4.

If you have not lived at your current address for more than five years, please list your addresses for the past five (5) years:

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840):
Select all that apply and attach appropriate verification.
 - ☐ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. ***If no, please explain (attach additional sheets if necessary):*** ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

CF

5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

I am well-qualified for the County Tax Collector position, possessing a Bachelor of Science in Business with an emphasis in finance from San Diego State University, completed in 2007. After gaining valuable hands-on experience in the accounting field, I chose to return to SDS to further my education and completed a Master of Science in Accounting with an emphasis in Tax May 2023.

To further expand on my qualifications, I bring over 19 years of experience in accounting, having founded and successfully managed my own accounting practice, in addition to serving as Controller for a prominent CFO consulting firm. My expertise spans a wide range of services, including accounting, bookkeeping, policy and procedure development, implementation of fraud prevention controls, and the creation of detailed operational workflows. I have consistently prepared and presented comprehensive financial packages to both boards of directors and operational leadership, with a focus on making financial information accessible and easy to understand for non-financial individuals.

I am skilled in identifying cost-saving opportunities, strengthening internal controls, and uncovering areas for operational improvement. I also have extensive experience delivering financial presentations to teams of 150+ employees. Throughout my career, I've managed an average of 20 clients at a time, providing ongoing support to 1–10 employees per organization while maintaining high standards of accuracy and efficiency.

I have extensive experience managing internal accounting teams and serving as a key liaison between business owners, office managers, on-site accountants, and external CPA firms. My work has supported a wide range of businesses, mostly locally founded San Diego companies and some nationwide non-profits. With nearly two decades of experience, I've consistently demonstrated the ability to juggle multiple priorities while effectively coordinating both internal and external teams.

In addition, my real estate experience began in 2009 with the purchase of my first home in San Diego, which has since become a rental property. As my interest and knowledge in real estate grew, I earned my real estate license in 2021. While I do not actively pursue real estate as a primary profession, I have successfully represented friends, family, and acted as executor for a family member's estate in the sale of their property.

Overall, my diverse background in finance, accounting, and real estate—combined with nearly 20 years of practical experience—positions me as a strong candidate for this role.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

I want to serve as County Treasurer because I am deeply committed to financial integrity, transparency, and responsible management of public funds. With nearly two decades of experience in accounting, financial management, and internal controls, across both public and private organizations, I bring a strong foundation of expertise that aligns directly with the responsibilities of the Treasurer's Office.

I am passionate about public service and believe that a well-run Tax Collector's office plays a critical role in maintaining the financial stability of the county. My goal would be to ensure that the county's financial operations are efficient, accurate, and compliant, while also building public trust through open communication and accountability.

I'm passionate about using my skills to support long-term fiscal health, implement best practices, and contribute meaningfully to the community I grew up in and proudly reside.

This role perfectly combines my professional expertise and my commitment to the community. Serving as County Treasurer would be both a professional culmination of my experience and a personal commitment to giving back in a meaningful and impactful way. It would be a true honor to serve and support my county in this capacity.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, Carrilynn Ford, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 18 day of September, 2025, at San Diego, California.

Signature: _____

E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.

San Diego State University

The Trustees of The California State University
upon recommendation of the Faculty
have conferred upon

Carrilynn E. Ford

the Degree of

**Bachelor of Science in Applied Arts and Sciences
Business Administration (Finance)**

with all rights, privileges and honors thereunto appertaining.

Given at San Diego State University this
twenty-second day of May, two thousand and seven.



Arnold Schwarzenegger

Governor of California
President of the Trustees

Robert Ficktenberg

Chair
Board of Trustees

Charles B. Reed

Chancellor
The California State University

Stephen S. Weber

President
San Diego State University



San Diego State University

The Trustees of The California State University
upon recommendation of the Faculty
have conferred upon

Carrilynn Ford

the Degree of

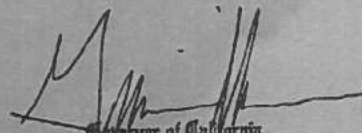
Master of Science

Accountancy

with all rights, privileges and honors thereunto appertaining.

Given at San Diego State University this
eighteenth day of May, two thousand and twenty-three.




Wanda Fong
Chair
Board of Trustees


Jolene Kolster
Interim Chancellor
The California State University


Arlene de la Torre
President
San Diego State University



CARRIE FORD



Analytical, detail-oriented accounting professional with a strong passion for optimizing processes and driving operational efficiency. I thrive in managing complex accounting challenges, from overseeing revenue recognition and balance sheet management to ensuring accurate payroll and benefits accounting. A self-starter, highly motivated, and results-driven,

I excel in streamlining accounting operations, implementing automation, and maintaining a robust internal control environment. I am committed to delivering actionable insights through financial analysis and forecasting, while effectively communicating results to senior leadership. With a forward-thinking mindset, I focus on both short-term and long-term strategies, anticipating future trends to inform key decisions. I have lead teams of accounting departments up to 10 employees.

My undergraduate degree in finance, along with my master's degree in accounting, has honed my ability to assess financial situations holistically, while my hands-on experience has strengthened my leadership and team management capabilities in corporate accounting. Currently CPA eligible with tests scheduled in the near future.

EDUCATION

MASTER OF SCIENCE IN ACCOUNTING, EMPHASIS IN TAX

San Diego State University

JAN 2021 - MAY 2023

- Deep understanding of tax code, tax cases, tax law. Individual classes include international tax, individual tax, LLP tax, auditing, cost management, fraud, managerial accounting, financial accounting, legal environment of business, accounting information systems, taxation of business entities, ethical decision making in business, operations & supply chain
- Systems included SAP- certification level 2 & Tableau master thesis

BACHELOR OF SCIENCE IN BUSINESS, EMPHASIS IN FINANCE

San Diego State University

2002-2007

CERTIFICATIONS & SYSTEMS

- CPA Eligible- currently preparing for first of four CPA certification exams
 - QuickBooks Certified ProAdvisor, experience in QB online, desktop & enterprise
 - SAP Certification Level 1: SAP Integrated Business Processes
 - SAP Certification Level 2 – Professional Certification
 - Proficient with Tableau
 - Systems used but not limited to: SaaSant, Shopify, Stripe, TaxJar, ADP, Paychex, Gusto, Brex, Rippling, Sage Intacct, Sage Contractor & NetSuite, Microsoft Excel & Word
-

EXPERIENCE

CONTROLLER

Signature Analytics | San Diego, CA

NOVEMBER 2021 – OCTOBER 2024

Working in a mid to large-sized organizations and companies. Managed teams remotely of 1 to 9 employees internally within Signature Analytics and externally within the organizations. Position ended due to company being sold. Client organizations include:

- Social justice organization with 80-250 employees, leading an accounting team of 9, including both organizational and SA employees, while reporting directly to the Director of Operations. Developed and implemented policies and procedures to ensure organizational efficiency, oversight, and fraud prevention. Created and standardized operating procedures for each role to ensure smooth operations despite high employee turnover. Overhauled monthly financial reporting for board of directors, staff and financial oversight board, presenting clear, actionable insights, including cost-saving strategies and plain-English financial summaries while identifying and flagging potential issues in advance. Assisted in resolving payroll compliance challenges across multiple states and worked closely with external auditors to ensure successful audit compliance, navigating potential going concern issues. Developed and implemented a new fiscal budget, incorporating cost-saving strategies in response to a reduction in revenue following the departure of the COO. Managed financial reports for budget vs. actual performance and tracked donations within Sage Intacct, overseeing annual contributions and donations averaging \$22 million.
- Non-profit and foundation in LA helping underprivileged kids with play equity. Helped the foundation financials with multiple high private equity investments and ensured accuracy and timely month close financials. Created schedules to easily track investment gain and loss. Managed a team of 5 and reported directly to CFO.
- Experience with SAAS entities specializing in online gaming in multiple countries. Worked with currency conversion and monthly bitcoin recognition with the help of systems Tipalti and Plaid for currency conversion and payments.

PRESIDENT AND FOUNDER

Ford Accounting Inc. | San Diego, CA

AUGUST 2006 – PRESENT

Aid small organizations and companies manage their month end close and monthly bookkeeping. Report directly to owner/director. Manage a team of 1-10 employees within each company. Companies leave my support by either becoming too large and needing more support or closing doors. Client industries include:

- Property Management for real estate agents, and individual self owned profile. Also hold a real estate license to better understand property management and represent self.
- Multiple non-profits involved with social justice change, women's clubs, and mental health.
- Managed and advised on corporate structure, creating management companies with different fiscal periods to ensure tax deferred benefits. Review year end accounting prior to close to ensure any big assets, additional pay structure, and other tax saving strategies
- Successfully moved multiple companies from QuickBooks to different accounting platforms, and vice versa.
- Experience with filing complex sales tax within multiple jurisdictions with nexus for product sales company
- Managed complex online sales products within shopify and stripe
- ASC 606 revenue recognition within a SaaS companies
- ASC 842 lease accounting
- Service industries including doctors, dentists, entertain industry, service industry, lawyers with gross income up to \$10 million annually.

-
- Real Estate investments, property flipper, mortgage broker, and real estate management. Currently manage my own rental real estate profile of multiple rentals. Being heavily involved in personal real estate, I have also expanded my knowledge in this industry to my clients by becoming a real estate agent June 2021.
 - General Contractor with extensive knowledge of construction billing.
 - Sales Tax Clients include three with nexus in multiple jurisdictions within California. Involved with complex sales tax filings quarterly. Ensure internal employees collect sales tax from customers.
 - Multiple cannabis clients, helped with year-end tax preparation. This involved complex year-end bookkeeping including categorization of COGS to optimize tax advantages and ensure compliance with state and federal regulations.
 - Bars and Restaurants.
 - Retirement services industry supported growing from \$75k to \$12 million. Helped with the acquisition of this company, and closing the entity financials once entity was sold.
-

**STATEMENT OF ECONOMIC INTERESTS
COVER PAGE**
A PUBLIC DOCUMENT

Date Initial Filing Received
Reg. Qtr.

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Ford Carrilynn E

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

County of San Diego

Division, Board, Department, District, if applicable

Your Position

Treasurer-Tax Collector

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County

☒ County of San Diego

☐ City of

☐ Other

3. Type of Statement (Check at least one box)

☐ Annual: The period covered is January 1, 2024, through
December 31, 2024.

☐ Leaving Office: Date Left / /
(Check one circle below.)

-or-

The period covered is / / , through
December 31, 2024.

☐ The period covered is January 1, 2024, through the date of
leaving office.

-or-

☐ Assuming Office: Date assumed / /

☐ The period covered is / / , through
the date of leaving office.

☒ Candidate: Date of Election 09/2025 and office sought, if different than Part 1:

4. Schedule Summary (required)

► Total number of pages including this cover page: 5

Schedules attached

☒ Schedule A-1 - Investments - schedule attached

☒ Schedule C - Income, Loans, & Business Positions - schedule attached

☒ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☒ Schedule B - Real Property - schedule attached

☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- ☐ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER

EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 09/17/2025

(month, day, year)

Signature

SCHEDULE A-1
Investments
Stocks, Bonds, and Other Interests
(Ownership Interest is Less Than 10%)
Do not attach brokerage or financial statements

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Carrilynn Ford

<BLUE> is a required field

NAME OF BUSINESS ENTITY	GENERAL DESCRIPTION OF THIS BUSINESS ACTIVITY	FAIR MARKET VALUE (Select from drop down list)	NATURE OF INVESTMENT (Select from drop down list. If "other," describe)	IF APPLICABLE, LIST DATE (mm/dd/yyyy)	
				ACQUIRED	DISPOSED
Google	online search engine	\$10,001 - \$100,000	Stock		
Amazon	online retailer	\$10,001 - \$100,000	Stock		
Netflix	Entertainment	\$10,001 - \$100,000	Stock		
Apple	Consumer Electronics, Software & Services	\$100,001 - \$1,000,000	Stock		
Palantir Technologies	Software	\$10,001 - \$100,000	Stock		
Nvidia Corp	engineer chips & AI software	\$10,001 - \$100,000	Stock		
Costco	Wholesale Supplier	\$2,000 - \$10,000	Stock		
Broadcom Inc	Engineering	\$2,000 - \$10,000	Stock		
Meta	Social Media	\$2,000 - \$10,000	Stock		

**Investments, Income, and Assets
of Business Entities/Trusts**
(Ownership Interest is 10% or Greater)

Carrilynn Ford

* Select from drop down list

advice@fppc.ca.gov • 866-275-3772 • www.fppc.ca.gov

700

Carrilynn Ford

*You are not required to report loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

FPPC Form 700 - Schedule Bx (2024/2025)
advice@fppc.ca.gov • 866-275-3772 • www.fppc.ca.gov

SCHEDULE C
Income, Loans, & Business
Positions

(Other than Gifts and Travel Payments)

CALIFORNIA FORM	700
FAIR POLITICAL PRACTICES COMMISSION	
Name	
Carrilynn Ford	

<BLUE> is a required field

* Select from drop down list

**You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

1. Income Received					2. Loans Received or Outstanding					
NAME AND ADDRESS OF SOURCE	BUSINESS ACTIVITY, IF ANY	YOUR BUSINESS POSITION	GROSS INCOME RECEIVED*	CONSIDERATION FOR WHICH INCOME WAS RECEIVED* (if "other," describe)	NAME AND ADDRESS OF LENDER** (Business Address Acceptable) AND GUARANTOR, IF ANY	BUSINESS ACTIVITY, IF ANY	HIGHEST BALANCE*	INTEREST RATE (%)	TERM (Mos/Yrs)	SECURITY FOR LOAN REAL PROPERTY ADDRESS/OTHER INFORMATION*
Ford Accounting Inc, 2801 B Street #50, San Diego CA 92102	Accounting & Real Estate	Owner	\$10,001-\$100,000	Salary	Small Business Association	Accounting	Over \$100,000	3.750%	30/yrs	Personal Residence
Airbnb- 1031 31st Street, San Diego CA 92102	Rental Property	Owner	\$10,001-\$100,000	Rental income						
4532 Dawson Ave, San Diego CA 92115	Rental Property	Owner	\$10,001-\$100,000	Rental income						

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Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

Gregory

First Name

Hodosevich

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD CLERK OF THE BOARD
2025 SEP 19 PM2:06



Application Timeline

- | | |
|---------------------------|---|
| September 22, 2025 | Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon. |
| September 30, 2025 | Hearing on all applicants. Please plan to attend this meeting. |

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ Yes, I understand

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ Yes, I understand

A. Tell us About Yourself

First Name: Gregory

Last Name: Hodosevich

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Phone 2:

E-mail:

Type: work

Type:

Have you lived at your current address for more than five years?
If no, please list your previous addresses on page 4.

☒ Yes ☐ No

GH

If you have not lived at your current address for more than five years, please list your addresses for the past five (5) years:

Date From: 2000 Date To: 2020

Street Address:

City:

State:

Zip Code:

Date From:

Date To:

Street Address:

City:

State:

Zip Code:

Date From:

Date To:

Street Address:

City:

State:

Zip Code:

Date From:

Date To:

Street Address:

City:

State:

Zip Code:

Date From:

Date To:

Street Address:

City:

State:

Zip Code:

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840): ☒ Yes ☐ No
Select all that apply and attach appropriate verification.
 - ☐ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. **If no, please explain (attach additional sheets if necessary):** ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

GH

5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

As a Certified Internal Auditor (CIA) and Certified Information Systems Auditor (CISA), I offer extensive executive experience managing complex financial, treasury, and IT system operations. My career is defined by leading high-stakes initiatives where technology and finance intersect to drive significant business outcomes.

Key accomplishments include:

- **Sempra Energy:** Led the critical migration to a new cloud-based ERP system, a prerequisite for the successful multi-billion dollar divestiture of their renewable assets. My role was instrumental in automating data extraction from the legacy systems, payments automation, employee training, and integrating systems with business partners.
- **GreatCall Inc:** My team was responsible for support of over 800K customers/subscribers, including tech support, billing, invoicing, and collections.
- **AMN Healthcare:** Resolved a "going concern" issue reported to the SEC by identifying and rectifying the root causes of financial and operational instability. This turnaround contributed to the company's subsequent revenue growth from \$600 million to over \$2 billion.
- **Integrated Polymer Solutions - Rubbercraft:** Aerospace & Defense: As part of the executive team, I played a key role in digital transformation of 60yr old company, successful passing a Department of Defense audit for a manufacturer of essential components for the F-35, F-16, and SpaceX rockets, facilitating the company's successful sale to a private equity firm.

Earlier in my career, I served as a Financial Systems Consultant with MD Management, a \$10B wealth management subsidiary of the Canadian Medical Association. I worked on optimizing investment portfolio management operations, improving performance through early applications of artificial intelligence (AI).

This unique combination of financial expertise, technology systems acumen, and rigorous auditing skills makes me a strong candidate for the San Diego County Treasurer/Tax Collector position.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

I ran for San Diego County Treasurer/Tax Collector in 2022 because I believed the office lacked leadership and innovation under the incumbent's 20-year tenure. While the tax collection duties were performed adequately, the office did not address critical financial and community challenges, such as rising inflation, which has contributed to a higher cost of living.

I also observed a missed opportunity for modernization. While 93% of taxpayers file online, the office continues to mail millions of paper bills, a practice that is both inefficient and costly. This lack of proactiveness extends to broader community issues, where the office has not used its position to help address problems like the rising homeless population, which disproportionately affects the local African American community.

One particularly concerning development is the City of San Diego's request for the County to manage billing and fees collection for trash disposal services. The City's own estimates show the project would cost millions, yet they expect the County to perform the service for a fraction of that cost. I would have sought a legal opinion and worked with the Board of Supervisors to find a solution that is both fiscally sound and fair to taxpayers. My collaborative approach would ensure we find solutions that work for all stakeholders.

The Treasurer's office can and should be a stronger partner to the Board of Supervisors, helping to address issues like the Tijuana River crisis and other challenges faced by underserved residents. If appointed, I would work to identify new funding sources and improve the efficiency of existing resources to deliver meaningful results for San Diego taxpayers and residents.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, Gregory Hodosevich, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 19 day of September, 2025, at San Diego, California.

Signature: _____

E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.



University of Toronto

Comparative Education Service

Research / Information / Evaluation

November 9, 1999.

TO WHOM IT MAY CONCERN:

Re: Mr. Gregory Hodosevich

Credentials of academic standing were submitted to the Comparative Education Service for interpretation and appraisal.

According to these documents, the above-mentioned person registered for a program of studies, from 1974 to 1979, at the Kyrgyz State University, Frunze/Bishkek, Kyrgyzstan.

Degree or Diploma obtained: Diploma with Honours and qualification of "Mathematician. Teacher", specializing in Mathematics, in 1979.

Although programs, degree requirements, and specializations may differ in various respects, we would consider Mr. Hodosevich's Diploma to be comparable in level to a four-year Bachelor of Science degree, in Mathematics, from a reputable Canadian university plus additional pedagogical study.

This assessment is for general and employment purposes only, and it does not constitute an offer of admission to a university. In addition, this letter does not commit any professional organization to accept our assessment in lieu of its own established classification requirements.

To determine whether Mr. Hodosevich qualifies for Ontario teacher certification, he would have to consult the Ontario College of Teachers, 121 Bloor Street East, 6th Floor, Toronto, Ontario, M4W 3M5 (Tel. 416-961-8800, ext. 330).

/ok

Olga Kindiakoff,
Manager.



University of Toronto

Comparative Education Service

Research / Information / Evaluation

November 12, 1999.

TO WHOM IT MAY CONCERN:

Re: Dr. Gregory Hodosevich

Credentials of academic standing were submitted to the Comparative Education Service for interpretation and appraisal.

According to these documents, the above-mentioned person was awarded the Diploma of *Kandidat Tehnicheskih Nauk* (Candidate of Technical Sciences), in 1994, issued by the Supreme Attestation Commission of the Government of the Republic of Kyrgyzstan, Bashkek, Kyrgyzstan.

We would consider the Candidate of Technical Sciences to be comparable in level to the standard required for the Doctor of Philosophy (Ph.D) degree from a reputable Canadian university, even though programs and degree requirements may differ to some extent.

This assessment is for general and employment purposes only. In addition, this letter does not commit any professional organization to accept our assessment in lieu of its own established classification requirements.

/ok

Olga Kindiakoff,
Manager.



THE TRUSTFORTE CORPORATION

271 Madison Avenue, Third Floor, New York, New York 10016

Tel: 212-481-4870 • Fax: 212-481-4971, 4972

Email: info@trustfortecorp.com www.trustfortecorp.com

ACADEMIC EVALUATION

Date: October 19, 2000

Name: **HODOSEVICH, GREGORY**

Country: Kyrgyzstan

Degree: Diploma No. 471823

Institution: Kyrgyzstan State University

Dates: 1974-1979

Educational Equivalent in the United States:

BACHELOR OF SCIENCE DEGREE IN MATHEMATICS

Enrollment in the Kyrgyzstan State University is based on graduation from high school and competitive entrance examinations; the University is an accredited institution of higher education in Kyrgyzstan. Mr. Hodosevich entered the University in 1974. He completed the required academic coursework and examinations in 1979 and was awarded a Diploma. The diploma is evidence that he completed his course of studies at the University.

Mr. Hodosevich completed both the general studies and specialized studies which lead to a degree from the University. The general studies included entry-level courses in language studies, the social sciences, mathematics, and the sciences, which are a requisite component of a bachelor's degree from an institution of higher education in the United States. Based on the subject matter and credit hours of these courses, most such courses would qualify as equivalent to courses in US institutions.

Additionally, Mr. Hodosevich completed the specialized studies which lead to a diploma from the University. He completed coursework in Mathematics and related areas. The nature of the courses and the credit hours involved indicate that he satisfied substantially similar requirements to the completion of academic studies leading to at least a Bachelor of Science Degree in Mathematics from an accredited institution of higher education in the United States.

Based on the reputation of the Kyrgyzstan State University, the number of years of coursework, the nature of the coursework, the grades attained in the courses, and the hours of academic coursework, it is the judgment of The Trustforte Corporation that Mr. Gregory Hodosevich received the equivalent of a Bachelor of Science Degree in Mathematics from an accredited institution of higher education in the United States.

This evaluation is based on copies of the original documents provided by Mr. Hodosevich and represented to be authentic and true copies of the original documents. We have no reason to



doubt the authenticity and accuracy of these documents. This is a true and correct evaluation to the best of our knowledge and belief, pursuant to requirements of United States Department of Justice Immigration and Naturalization Service ("INS") Form I-797 (8/03/90) Y. The Trustforte Corporation is a credentials evaluation service specializing in the evaluation of foreign educational credentials. Past academic equivalency evaluations of The Trustforte Corporation have been accepted regularly by the INS and various US educational institutions.

Corporate Seal

Barry S. Silberzweig, B.A., J.D., M.B.A., Evaluator; Member, American Association of Collegiate Registrars and Admissions Officers (AACRAO), NAFSA: Association of International Educators, and National Association of Graduate Admissions Professionals (NAGAP). *For detailed statement of qualifications and experience of evaluator, see attached resume.*

- References:
1. American Association of Collegiate Registrars and Admissions Officers, Association of International Educators, The Soviet System of Education, Washington, D.C.: AACRAO/NAFSA, 1992.
 2. International Academic Credentials Handbook, Volume II, Washington, D.C.: AACRAO/NAFSA, 1989.
 3. Taylor, Ann [ed.]. *International Handbook of Universities and Other Institutions of Higher Education*, 12th ed. NY: Stockton Press, 1991.
 4. U.S. Department of Education, National Center for Education Statistics. *Trends in Degrees Conferred by Institutions of Higher Education: 1984-85 Through 1990-91*. Washington, D.C.: U.S. Government Printing Office, 1993.

18-SEP-2025

HODOSEVICH, GREGORY

Student Name

Birthdate

Student Number

CREDIT COURSEWORK COMPLETED AT SMC

SMC Course	SMC Course Title	Grade	Units Attmptd	Units Compltd	Note	Grade Points	GPA	UC-T/ CalGETC	UC-T/ IGETC	CSU-T/ CSU GE	AA
Fall 2010											
ACCTG 10A	INTERM ACCTNG A	B	3.0	3.0		9.0				CSU	AA
ACCTG 10B	INTME ACCTNG B	C	3.0	3.0		6.0				CSU	AA
ACCTG 15	IND INCOME TAX	B	3.0	3.0		9.0				CSU	AA
ACCTG 16	CORPORATE TAX	B	3.0	3.0		9.0				CSU	AA
	Semester Total		12.0	12.0		33.0	2.750				
	SMC Cumulative Total		12.0	12.0		33.0	2.750				
Winter 2011											
ACCTG 10C	INTERM ACCTG C	B	4.0	4.0		12.0				CSU	AA
	Semester Total		4.0	4.0		12.0	3.000				
	SMC Cumulative Total		16.0	16.0		45.0	2.813				

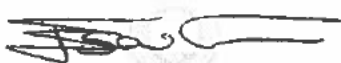
(Excludes Work in Progress)

	Units Attmptd	Units Compltd	Grade Points	GPA
Cumulative Total	16.00	16.00	45.00	2.813
Combined Degree Total	16.00	16.00	45.00	2.813
NON-SMC Total	0.00	0.00	0.00	0.000
SMC Total	16.00	16.00	45.00	2.813
AA Total	16.00	16.00	45.00	2.813
CSU Total	16.00	16.00	45.00	2.813
UC Total	0.00	0.00	0.00	0.000

AA, CSU, and UC Total statistics above only include courses completed at SMC starting Fall 1984.

End of Credit Transcript

Page 1 of 1



ESAU TOVAR, Ph.D.
DEAN, ENROLLMENT SERVICES

SANTA MONICA COLLEGE

1900 Pico Boulevard | Santa Monica, California 90405-1628

ACCREDITATION

Santa Monica College, founded in 1929, is a two-year community college accredited by the Accrediting Commission for Community and Junior Colleges (ACCJC), formerly part of the Western Association of Schools and Colleges (WASC).

CALENDAR & UNITS

The College operates on a semester calendar. All course units are semester units.

STUDENT STATUS

Full-time enrollment is 12 units for a 16-week semester. Students are honorably withdrawn, unless otherwise indicated.

DEGREE REQUIREMENTS

Santa Monica College offers a range of undergraduate degrees and certificates. The Bachelor of Science in Interaction Design is conferred to students upon completion of 120 units (inclusive of major, general education, and elective credit). The Associate degree is conferred upon completion of 60 degree-applicable units (inclusive of major, general education, and elective credit). Some degrees require additional units. A Certificate of Achievement is conferred to students upon completion of program requirements. A minimum grade point average (GPA) of 2.00 (C) is required for all degree-applicable coursework. Noncredit coursework leading to a noncredit Certificate of Completion or a Certificate of Competency will be clearly annotated on a separate sheet of the transcript.

COURSE NUMBERING

001-299	Associate-degree applicable, unless "NDA" is noted.
300-499	Upper-division courses are available only to students in the B.S. in Interaction Design.
900-999	Noncredit courses.
C1000-C2000	Designated Common Course Numbering system courses. See below.

Common Course Numbering

Effective with Fall 2025 courses, Santa Monica College is transitioning to the **Common Course Numbering (CCN)** system. The CCN system is a state-mandated initiative (AB1111) aimed at ensuring uniformity in course numbers across the California Community Colleges. The new system uses a four-letter abbreviation for the "Subject" (e.g., ENGL for English); a "C" for the Common Course Number as the Course Type Identifier (this excludes local courses); and a standardized four (4)-digit course identification as the Course Number.

TRANSCRIPT FORMAT

SMC implemented a new academic record system in the fall of 1984. The transcript of a student enrolled both before and after this implementation may be composed of two separately formatted transcripts.

FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT

This transcript has been released in accordance with provisions of the Family Educational Rights and Privacy Act (FERPA) of 1974 and

cannot be released to a third party without the written consent of the student.

COLLEGE GRADING SYSTEM

Prior to September 1957, grade points were calculated on a 3-point system:

A = 3; B = 2; C = 1; D = 0; F = 0

After September 1957, grade points are calculated on a 4-point system, as follows:

A = 4; B = 3; C = 2; D = 1; F = 0

The following grades are computed in the GPA:

- A Excellent
- B Good
- C Satisfactory
- D Passing, less than satisfactory
- F Failing

The following grades are NOT computed in the GPA:

- I Incomplete
- IP In Progress
- RD Report Delayed
- CR Credit given – Performance equivalent to C or better grade
- P Pass – As of fall 2008 this term is used instead of CR for Credit. Performance equivalent to C (2.0) or better grade
- NC No Credit given – Performance equivalent to D or less
- No Pass – As of fall 2008 this term is used instead of NC. Performance equivalent to D or less
- SP Satisfactory Progress-used in grading non-credit coursework
- MW Military Withdrawal (honorable withdrawal; no impact on GPA, academic or progress probation/disqualification)
- W Withdrawal
- EW Excused Withdrawal (honorable withdrawal; no impact on GPA, academic or progress probation/disqualification)

OTHER NOTATIONS

UC-T/ Cal- GETC	Courses marked as "UC" are transferable to the University of California. Courses marked 1-6 also meet Cal-GETC general education requirements for that area.
UC-T/ IGETC	Courses marked as "UC" are transferable to the University of California. Courses marked 1-6 also meet IGETC general education requirements for that area.
CSU-T/ CSUGE	Courses marked as "CSU" are transferable to the California State University. Courses marked A-E also meet CSUGE Breadth requirements for that area.
AA	Courses marked as "AA" are Associate Degree-applicable.
SCOL	Indicates course taken as part of the Scholars program.

Legend updated: 07/2025



Palomar College

Page 1 of 1

Name : Gregory Hodosevich
Student ID : [REDACTED]
SSN : [REDACTED]
Birthdate : [REDACTED]
Print Date : 09/18/2025

Palomar Community College District
Identifying Code: [REDACTED]

Official Transcript

Send To: GREGORY HODOSEVICH
[REDACTED]

Beginning of Credit Record

2010 Spring

<u>Course</u>		<u>Description</u>		<u>Attempted</u>	<u>Earned</u>	<u>Grade</u>	<u>Points</u>
ACCT	103	FINANCIAL ACCOUNTING		4.0	4.0	A	16.0
ACCT	104	ACCOUNTING SPREADSHEET LAB		1.0	1.0	A	4.0
Term GPA		4.000	Term Totals	<u>Attempted</u>	<u>Earned</u>	<u>GPA Units</u>	<u>Points</u>
Cum GPA		4.000	Cum Totals	5.0	5.0	5.0	20.0
				5.0	5.0	5.0	20.0

2014 Summer

<u>Course</u>		<u>Description</u>		<u>Attempted</u>	<u>Earned</u>	<u>Grade</u>	<u>Points</u>
BUS	138	BUSINESS ETHICS		2.0	2.0	B	6.0
Term GPA		3.000	Term Totals	<u>Attempted</u>	<u>Earned</u>	<u>GPA Units</u>	<u>Points</u>
Cum GPA		3.714	Cum Totals	2.0	2.0	2.0	6.0
				7.0	7.0	7.0	26.0
Credit Career Totals							
Cum GPA:		3.714	Cum Totals	7.0	7.0	7.0	26.0

End of Credit Record

Kendyl L. Magnuson, Ed.D.
Director of Enrollment Services



PALOMAR COLLEGE

Palomar Community College District

Office of Admissions and Records
1140 West Mission Road
San Marcos, CA 92069-1487

www.palomar.edu
(760) 744-1150, ext. 2169
Fax (760) 744-2932

TRANSCRIPT GUIDE

Palomar College is a semester-system, two-year public California Community College officially accredited by the Western Association of Schools and Colleges. Palomar College is also officially accredited by the American Dental Association, the Board of Registered Nursing, and the National League for Nursing, the committee on Accreditation of Educational Programs for the Emergency Medical Services Profession, and the California Commission on Peace Officer Standards and Training.

Course Numbering System

Effective Summer 1990*:

1-49	Non-Associate degree applicable	
50-99	Associate degree applicable/transferable	Non-
100-299	Lower division transferable course work	

*The Degree total line at the end of the transcript includes course work from Fall 1991 and forward.

1969/70 to 1989/90:

1-99	Lower division transferable
100 & up	Non-transferable

1946 to 1969:

An explanation will be provided upon request

Pre-Summer 1983 Records

Students with records prior to Summer 1983 have the notation "**** Pre-1983 Summer enrollments. Microfilm index number: —" printed below the header. Records prior to Summer 1983 will be listed on a separate photocopy of a microfilmed record. The Credit Career Totals do not include Pre-Summer 1983 course work.

Notes

Notes such as grade changes, course repeats, grade basis definitions, Academic Renewal, Credit by Examination and requirement designations (e.g. Multicultural) are listed below the course.

Grade Symbols

A	Excellent	4 points per unit
B	Good	3 points per unit
C	Satisfactory	2 points per unit
D	Less than satisfactory	1 point per unit
F	Failing	0 grade points
FW	Failing for unofficial Withdrawal	0 grade points

Not computed in grade point average:

P	Passing (At least satisfactory)
CR	Credit (Satisfactory or better)
NP	No Pass (Less than satisfactory or failing)
NC	No Credit (Less than satisfactory or failing)
I	Incomplete
IP	In Progress
W	Withdrawal
MW	Military Withdrawal (Without penalty)
EW	Excused Withdrawal
RD	Report Delayed (Temporary notation)
SP	Satisfactory Progress (Noncredit only)

Noncredit Courses:

A variety of courses are offered with no unit credit. The courses are taught by credentialed instructors and provide remedial, developmental, occupational, and other general educational opportunities to citizens of the community.

Release of Student Information

This transcript has been issued in accordance with the Family Educational Rights and Privacy Act of 1974. The information contained in this record is confidential, and may not be released to anyone without the written consent of the student.

This Academic Transcript from Palomar College located in San Marcos, CA is being provided to you by Parchment, Inc. Under provisions of, and subject to, the Family Educational Rights and Privacy Act of 1974, Parchment, Inc is acting on behalf of Palomar College in facilitating the delivery of academic transcripts from Palomar College to other colleges, universities and third parties.

This secure transcript has been delivered electronically by Parchment, Inc in a Portable Document Format (PDF) file. Please be aware that this layout may be slightly different in look than Palomar College's printed/mailed copy, however it will contain the identical academic information. Depending on the school and your capabilities, we also can deliver this file as an XML document or an EDI document. Any questions regarding the validity of the information you are receiving should be directed to: Office and Admissions and Records, Palomar College, 1140 West Mission Road, San Marcos, CA 92069-1487, Tel: (760) 744-1150, ext. 2169.

GREGORY HODOSEVICH, Ph.D., CIA, CISA

Finance and Financial Systems Executive with documented record of strong leadership for high-tech and manufacturing enterprises

Career Highlights:

- Delivered digital and operational transformation in Finance, Treasury, IT, and Operations for enterprises generating up to \$10B annually
- \$1.8B in annual credit card payment processing
- Delivered customer support for 800K telecom clients, ensuring timely invoicing, collections, and tech issue resolution
- Internal Audit of Financial, IT, Investment Portfolio Management, and Manufacturing operations for compliance with GAAP, SOX, HIPAA, US Dept. of Defense data and network security regulations

CHIEF FINANCIAL OFFICER/FINANCIAL CONSULTANT
GVR Group, Management Consulting Company

Sep 2019 – Present
San Diego, CA

Major Projects and Services

- Digital innovation and transformation of Financial, manufacturing, and customer service operations.
- Cloud Financial, CRM, and ERP implementation at Contract Manufacturing Organization (General Ledger, Accounts Payable, Accounts Receivable, Fixed Assets, Manufacturing, Sales, Quality, R&D, Inventory, integration with business partners).
- Investment Portfolio Management and optimization.
- Partnered with client CFO and his team and cooperated on the following matters:
 - Month-end closing
 - GL and Subledger reconciliation
 - Accounts Payable automated processing
 - Accounts Receivable aging analysis and collections
- Led Internal Audit of Financial, Accounting, and Manufacturing operations at a cosmetics manufacturing plant:
 - Identified gaps
 - Developed and executed remediation plan
 - Delivered a set of SOP (standard operating procedures) for compliance with GAAP and FDA regulations.
- AI-driven IT Helpdesk system design and implementation.

DIRECTOR, FINANCIAL SYSTEMS AND INFORMATION TECHNOLOGY

May 2018 – Aug 2019

Integrated Polymer Solutions - Rubbercraft (Aerospace and Defense Manufacturing)

Long Beach, CA

Member of the Executive Team with overall responsibility for Financial and Operational Systems, digital transformation, and compliance with US Dept. of Defense regulations.

Major Projects

- Created 2-yr Enterprise Technology Roadmap and had it completed in 1 year. Devised and executed a plan to turnaround the company:
 - Implementation of the new technologies, including AI.
 - Lean Manufacturing, automation of manual operations.
 - The turnaround transformed the company and increased its valuation by \$115M.
- Financial system operations (General Ledger, A/R, A/P, Fixed Assets, Inventory, Sales Order, Collections, Manufacturing, Shipping and Receiving, Time & Labor, Payroll).
- Internal Audit of Accounting, Information Technology, and Manufacturing ops: Gap analysis and remediation.
- In July 2019, the company was sold to a Private Equity firm.

CHIEF FINANCIAL OFFICER

Jul 2011 – Aug 2018

Del Mar Villas Inc, a property management organization

San Diego, CA

Major Projects

- Oversaw financial, treasury, and accounting operations. Oversaw preparation of monthly financial statements.
- Investment Portfolio Management.
- Delivered Periodic financial reports to the Board of Directors.
- Developed annual budget and established ongoing variance analysis.

- Independent CPA audit; Federal and state income tax returns.

MANAGER, INFORMATION SYSTEMS/ENTERPRISE DATABASE ADMINISTRATOR

Jan 2012 – May 2018

Greatcall Inc, Telecom company with 800K cell phone customers; 1,100 employees

San Diego, CA

Responsible for development and operations of Financial and CRM systems

Major Projects

- Operations of Financial and CRM systems. Operations of Databases, 100+ software applications.
- Customer support for 800K cell phone users, including billing, collections, and tech issues.
- Internal Audit of Accounting, Information Technology, and Customer Service ops: Gap analysis and remediation for compliance with GAAP, HIPAA, and PCI (Payment Card Industry).
- Integration of internal IT systems with major retailers, including BestBuy, WalMart, and Rite Aid.
- ERP operations & integration with other systems. Financials, Sales, and SQL-based real-time KPI reports.
- Implemented the following innovative technologies to increase annual sales from \$130M to \$320M:
 - Annual introduction of new cell phone models
 - Real-time Integration of operational systems with the ERP and CRM systems
 - Mobile apps for iPhone and Android-based systems
- Delivered Enterprise Data Warehouse and improved per-customer profitability by 12%
- The company was sold to BestBuy for \$800M.

Financial Systems Consultant

Aug 2016 – May 2017

Sempra Energy (\$10B, 17,000 employees)

San Diego, CA

Energy Company serving 600,000 homes and businesses.

Major Projects

- Implementation of the new cloud-based ERP system, Microsoft Dynamics 365 for Finance and Operations. The system includes GL, AP, Fixed Assets, Project Accounting, and Procurement for over 100 subsidiaries of Sempra Energy.
- Migration from the legacy systems to the new ERP system.
- Upon completion of the project Sempra sold its Renewables holdings for about \$5B.

MANAGER, FINANCIAL SYSTEMS/FINANCIAL SYSTEMS DEVELOPER

Mar 2007 – Nov 2011

Active Network Inc (\$340M, 2,300 employees)

San Diego, CA

Software as a Service company processing over \$1.8B credit card payments a year.

Major Projects

- IPO on New York Stock Exchange, ticker: ACTV; \$140M.
- Compliance with SOX, PCI, GAAP, HIPAA.
- Technology innovation as a method to automate sales, operations and increase annual revenue to \$340M over 4yrs.
- Financial Systems operations (General Ledger, Accounts Receivable, Accounts Payable, Fixed Assets, Sales Order, Procurement, Time Cards, Oracle Projects, HR, Healthcare Benefits).
- M&A of seven acquired companies in US, Canada, Great Britain, China, Singapore and Australia.
- Managed relationship with technology and business partners: Oracle Corp; Netapps Inc, and Wells Fargo Bank.

ENTERPRISE DATA ARCHITECT/SR. DATABASE ADMIN

Jan 2004 - Jan 2009

AMN Healthcare (NYSE: AMN; 7,100 employees; 120 IT Staff; \$1.2B revenue)

San Diego, CA

Planned and executed IT initiatives, which enabled company growth and doubled sales in four years from \$600M to \$1.2B. Supported three mergers and acquisitions helping to build client base to over 4,000 hospitals.

Strategic Initiatives

- Created a 4-year Enterprise Roadmap and had it completed in 3 yrs. The Roadmap included:
 - Stabilization of the existing Financial and CRM applications
 - Resolving a “going concern” issue with Securities and Exchange Commission (SEC)
 - Compliance with newly enacted Sarbanes-Oxley Act (SOX).
- Technology Innovation as the key factor for doubling sales from \$600M to \$1.2B. New technologies included CTI (computer-telephone integration) and automation of sales and operations.

Achievements

- Automated previously manual sales processes and reduced expenses by \$1.3M/yr.
- Reengineering of call center operations with new technology, directly increasing annual sales by \$10M.
- Created a satellite data center for Disaster Recovery to ensure business continuity in case of catastrophic system failure (e.g. natural disaster).

Previous Experience:

Financial Systems Consultant

MD Management Inc, a \$10B (CAD) subsidiary of Canadian Medical Association
Wealth management services for 52,000 Canadian physicians.

Ottawa, Canada

Major Projects:

- Investment Portfolio Management optimization. Development of automated decision support system for periodic recalibration of a given portfolio per Investment Policy Statement.
- Risk management and mitigation.
- Performance reporting and client communications.

EDUCATION AND PROFESSIONAL ORGANIZATIONS

Certified Internal Auditor (CIA), Cert. # 104568

Certified Information Systems Auditor (CISA), Cert. # 14113759

Ph.D. in Geotechnical Engineering - University of Toronto equivalency / Supreme Attestation Commission, Kyrgyz Republic

B.A. in Math - University of Toronto equivalency/Kyrgyz State University

UCSD Extension, courses in Accounting and Project Management

Santa Monica College, courses in Accounting

Palomar College, courses in Accounting and Business Ethics

San Diego CFO Roundtable member

Carmel Valley Planning Board member

Forbes Finance Council, past member

National Small Business Association, past member of the Leadership Council

**STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT**

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Hodosevich Gregory

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

San Diego County

Division, Board, Department, District, if applicable

Your Position

Treasurer/Tax Collector

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

State

Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

Multi-County

County of San Diego

City of

Other

3. Type of Statement (Check at least one box)

☒ Annual: The period covered is January 1, 2024, through December 31, 2024.

-or-

The period covered is through December 31, 2024.

Leaving Office: Date Left (Check one circle below.)

The period covered is January 1, 2024, through the date of leaving office.

-or-

The period covered is through the date of leaving office.

Assuming Office: Date assumed

☒ Candidate: Date of Election 9/30/25 and office sought, if different than Part 1

4. Schedule Summary (required)

► Total number of pages including this cover page: 2

Schedules attached

Schedule A-1 - Investments - schedule attached

Schedule C - Income, Loans, & Business Positions - schedule attached

☒ Schedule A-2 - Investments - schedule attached

Schedule D - Income - Gifts - schedule attached

Schedule B - Real Property - schedule attached

Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER

EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 09/18/2025

Signature

(File the original signed paper statement with your filing official.)

SCHEDULE A-2
Investments, Income, and Assets
of Business Entities/Trusts
(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

Gregory Hodosavich

1. BUSINESS ENTITY OR TRUST

GVR Group

Name

PO Box 910295 San Diego, CA 92191

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☒ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

Management Consulting and Information Tech Services

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE

\$0 - \$1,999

\$2,000 - \$10,000

\$10,001 - \$100,000

☒ \$100,001 - \$1,000,000

Over \$1,000,000

1 / 24

ACQUIRED

1 / 24

DISPOSED

NATURE OF INVESTMENT

☒ Partnership ☐ Sole Proprietorship

Other _____

YOUR BUSINESS POSITION Partner, CFO

1. BUSINESS ENTITY OR TRUST

Name

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE

\$0 - \$1,999

\$2,000 - \$10,000

\$10,001 - \$100,000

\$100,001 - \$1,000,000

Over \$1,000,000

1 / 24

ACQUIRED

1 / 24

DISPOSED

NATURE OF INVESTMENT

☐ Partnership ☐ Sole Proprietorship

Other _____

YOUR BUSINESS POSITION _____

2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

\$0 - \$499

\$500 - \$1,000

☒ \$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary)

☒ None or Names listed below

2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

\$0 - \$499

\$500 - \$1,000

☐ \$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary)

☐ None or Names listed below

4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT

☐ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000

\$10,001 - \$100,000

\$100,001 - \$1,000,000

Over \$1,000,000

1 / 24

ACQUIRED

1 / 24

DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust

☐ Stock

☐ Partnership

☐ Leasehold

 Yrs. remaining

☐ Other

Check box if additional schedules reporting investments or real property are attached

4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT

☐ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE

\$2,000 - \$10,000

\$10,001 - \$100,000

\$100,001 - \$1,000,000

Over \$1,000,000

1 / 24

ACQUIRED

1 / 24

DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust

☐ Stock

☐ Partnership

☐ Leasehold

 Yrs. remaining

☐ Other

Check box if additional schedules reporting investments or real property are attached

Comments:

None

Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

Shirley

First Name

Nakawatase

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD CLERK OF THE BOARD
2025 SEP 22 AM9:50



Application Timeline

September 22, 2025 Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon.

September 30, 2025 Hearing on all applicants. Please plan to attend this meeting.

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ **Yes, I understand**

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ **Yes, I understand**

A. Tell us About Yourself

First Name: Shirley

Last Name: Nakawatase

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Type:

mobile

Phone 2:

Type:

E-mail:

Have you lived at your current address for more than five years?

☐ Yes

☒ No

If no, please list your previous addresses on page 4.

**If you have not lived at your current address for more than five years, please list
your addresses for the past five (5) years:**

Date From: 07-15-71 Date To: 05-01-22
Street Address: [REDACTED]
City: [REDACTED]
State: [REDACTED] Zip Code: [REDACTED]

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840): ☒ Yes ☐ No
Select all that apply and attach appropriate verification.
 - ☐ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☒ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

sn

5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

I bring a unique combination of professional expertise, ethical leadership, and decades of community service that makes me highly qualified to serve as San Diego County Treasurer-Tax Collector. With over thirty years of experience as a Certified Public Accountant, I have built my career on transparency, fiscal accountability, and trust—qualities essential for managing taxpayer dollars and overseeing one of the most important financial offices in the county.

As the founder and managing partner of my own CPA firm, I have provided accounting, auditing, and financial advisory services to thousands of individuals, businesses, and nonprofit organizations across San Diego County. This hands-on experience has given me a deep understanding of financial systems, tax compliance, internal controls, and revenue oversight. I have successfully managed complex budgets, guided organizations, and implemented fiscal strategies that prioritize efficiency and accountability. My reputation as a trusted financial professional is backed by decades of service and a spotless record of integrity.

Beyond my professional accomplishments, I have demonstrated a lifelong commitment to public service and community leadership. I have served as Chair and Treasurer of the San Diego Regional Center, Treasurer of the San Diego County Capital Asset Leasing Corporation, and Past President and Treasurer of the Imperial Beach Boys & Girls Club. For more than 25 years, I served on the Imperial Beach Design Review Board, helping shape local projects with fairness and responsibility. As a member and leader within Kiwanis International, I have worked tirelessly to support youth programs, community service, and educational opportunities. Each of these roles required financial stewardship, ethical decision-making, and accountability—skills directly transferable to the Treasurer-Tax Collector's office.

My leadership extends to large-scale civic initiatives. I was instrumental in restoring the world-famous Imperial Beach US Open Sandcastle Competition, now the Sun & Sea Festival, ensuring financial sustainability and community pride. I have also participated in school bond oversight committees, where I monitored the proper allocation of taxpayer funds for education. These experiences demonstrate my ability to balance fiscal responsibility with community priorities, a skill set that is critical for safeguarding the county's financial future.

What sets me apart is not only my professional expertise but also my unwavering commitment to public trust. I believe the Treasurer-Tax Collector's role is not simply about balancing books, but about ensuring that taxpayer dollars are managed with honesty, transparency, and efficiency. In an era where financial accountability is more important than ever, I offer proven experience, independent judgment, and a genuine dedication to serving the people of San Diego County.

I am not just running for office—I am stepping forward to ensure the Treasurer-Tax Collector's office is managed with the highest level of professionalism, ethical responsibility, and care for the community. My career, leadership, and service prove I am the right choice to safeguard taxpayer dollars and build a stronger financial foundation for San Diego County.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

I want to serve as San Diego County Treasurer-Tax Collector because I believe in the fundamental importance of financial stewardship, transparency, and accountability in local government. This office is not just about balancing budgets—it is about ensuring that taxpayer dollars are managed efficiently, ethically, and in a way that strengthens the services and infrastructure our community relies on every day.

With over thirty years as a Certified Public Accountant, I have seen firsthand how strong financial oversight can make the difference between thriving organizations and those burdened by inefficiency or mismanagement. I want to bring that expertise to San Diego County, applying proven accounting and auditing skills to protect and grow public resources, maintain trust in government, and ensure that every dollar is used wisely.

Beyond the numbers, I am motivated by service to the community. My decades of involvement in civic and nonprofit organizations—leading boards, overseeing budgets, and mentoring youth—have reinforced my commitment to public service and responsible leadership. Serving as Treasurer-Tax Collector provides an opportunity to combine my professional skills with my passion for supporting the people of San Diego County.

I also see this role as a chance to make government more accessible and accountable. Every resident deserves to know that their tax dollars are managed competently and transparently. I want to be the public servant who ensures that financial processes are clear, efficient, and trustworthy, and that the office of the Treasurer-Tax Collector actively supports the well-being of our communities.

Finally, I am driven by a vision of leaving a lasting, positive impact on the county's financial health. By managing public funds prudently, improving systems, and maintaining ethical standards, I can help build a stronger fiscal foundation for today and for generations to come. This office is both a responsibility and an opportunity to serve with integrity, competence, and dedication, and I am committed to fulfilling that mission if entrusted with this role.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature


I, Shirley Nakawatase, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 21 day of September, 2025, at Imperial Beach, California.

Signature: 

E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.

BOARD OF ACCOUNTANCY
LICENSING DETAILS FOR: 56695

NAME: NAKAWATASE, SHIRLEY

LICENSE TYPE: CERTIFIED PUBLIC ACCOUNTANT

LICENSE STATUS: CLEAR

EXPERIENCE COMPLETED: A

PREVIOUS NAMES: CHASE, SHIRLEY EVON MIYANOMAE ♦ NAKAWATASE, SHIRLEY
EVON MIYANOMAE ♦ NAKAWATASE, SHIRLEY EVON MIYANOMAE_CH

ADDRESS



SAN DIEGO COUNTY

ISSUANCE DATE

SEPTEMBER 7, 1990

EXPIRATION DATE

SEPTEMBER 30, 2025

CURRENT DATE / TIME

SEPTEMBER 22, 2025
9:42:55 AM

Shirley E. M. Nakawatase, CPA

Professional Summary

Certified Public Accountant with over 30 years of experience in accounting, financial oversight, and community leadership. Proven record of managing budgets, audits, and public resources with transparency and accountability. Experienced in both private practice and public service, dedicated to strengthening fiscal responsibility in San Diego County government.

Core Competencies

Government & Public Finance	Budgeting & Forecasting	Regulatory & Tax Compliance
Revenue & Cash Flow Oversight	Internal Controls & Risk Management	Strategic Planning & Policy Review
Audit & Accountability	Leadership & Community Engagement	Public Trust & Transparency

Professional Experience

HNK CPAs – Imperial Beach & El Cajon, CA

Founder, Partner & Consultant (1990 – Present)

- Established and manage a successful CPA firm serving individuals, businesses, and nonprofits throughout San Diego County.
- Provide full-service accounting: audits, tax compliance, budgeting, and financial strategy.
- Built a reputation for ethical service, transparency, and attention to detail.

Palomar College – San Marcos, CA

Adjunct Faculty (Accounting)

- Taught accounting and finance courses, preparing students for careers in business and public service.
- Introduced real-world case studies on public finance, tax policy, and compliance.

Government, Community & Leadership Service

- San Diego Regional Center – Past Chair and Treasurer
- Kiwanis International – Member since 1991; served as Lt. Governor, Cabinet Member
- Imperial Beach Boys & Girls Club – Past President and Treasurer
- Imperial Beach Design Review Board – Chair & Member for 25 years
- South Bay Union School District – Bond Budget Committee Member
- Sun & Sea Festival – Restored Imperial Beach Sandcastle Event
- SANCAL (San Diego County) – Treasurer
- Girl Scouts of San Diego – Lifetime Member and Troop Leader

Education

B.S. Accounting, San Diego State University

Certified Public Accountant, State of California (Active License)

Selected Achievements

- Built and sustained a respected CPA practice for over three decades.
- Directed multimillion-dollar bond budget processes with accountability and transparency.
- Restored the Imperial Beach Sandcastle/Sun & Sea Festival.
- Provided consistent financial leadership across nonprofit and civic organizations

**STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT**

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST)	(FIRST)	(MIDDLE)
NAKAWATASE	SHIRLEY	E.M.

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

SAN DIEGO COUNTY TREASURER-TAX COLLECTOR

Division, Board, Department, District, if applicable

Your Position

TREASURER-TAX COLLECTOR

APPLICANT

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County _____

☒ County of **SAN DIEGO**

☐ City of _____

☐ Other _____

3. Type of Statement (Check at least one box)

☐ **Annual:** The period covered is January 1, 2024, through December 31, 2024.

☐ **Leaving Office:** Date Left ____/____/____
(Check one circle below.)

-or-

The period covered is ____/____/____, through December 31, 2024.

☐ The period covered is January 1, 2024, through the date of leaving office.

-or-

☐ **Assuming Office:** Date assumed ____/____/____

☐ The period covered is ____/____/____, through the date of leaving office.

☒ **Candidate:** Date of Election **TBD** and office sought, if different than Part 1: _____

4. Schedule Summary (required)

► Total number of pages including this cover page: _____

Schedules attached

☒ **Schedule A-1 - Investments** - schedule attached

☒ **Schedule C - Income, Loans, & Business Positions** - schedule attached

☒ **Schedule A-2 - Investments** - schedule attached

☐ **Schedule D - Income - Gifts** - schedule attached

☒ **Schedule B - Real Property** - schedule attached

☐ **Schedule E - Income - Gifts - Travel Payments** - schedule attached

-or- ☐ **None - No reportable interests on any schedule**

5. Verification

MAILING ADDRESS	STREET	CITY	STATE	ZIP CODE
(Business or Agency Address Recommended - Public Document)				

DAYTIME TELEPHONE NUMBER	EMAIL ADDRESS
_____	_____

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed **SEPTEMBER 21, 2025**
(month, day, year)

Signature _____
(File the originally signed paper statement with your filing official.)

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

SHIRLEY NAKAWATASE

▶ NAME OF BUSINESS ENTITY

LPL FINANCIAL

GENERAL DESCRIPTION OF THIS BUSINESS

BROKERAGE ACCOUNTS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☐ \$10,001 - \$100,000☒ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other

(Describe)

☐ Partnership☐ Income Received of \$0 - \$499☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24

ACQUIRED

____/____/24

DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☐ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock☐ Other

(Describe)

☐ Partnership☐ Income Received of \$0 - \$499☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24

ACQUIRED

____/____/24

DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☐ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock☐ Other

(Describe)

☐ Partnership☐ Income Received of \$0 - \$499☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24

ACQUIRED

____/____/24

DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☐ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock☐ Other

(Describe)

☐ Partnership☐ Income Received of \$0 - \$499☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24

ACQUIRED

____/____/24

DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☐ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock☐ Other

(Describe)

☐ Partnership☐ Income Received of \$0 - \$499☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24

ACQUIRED

____/____/24

DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☐ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock☐ Other

(Describe)

☐ Partnership☐ Income Received of \$0 - \$499☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24

ACQUIRED

____/____/24

DISPOSED

Comments:

SCHEDULE A-2
Investments, Income, and Assets
of Business Entities/Trusts
(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name SHIRLEY NAKAWATASE

1. BUSINESS ENTITY OR TRUST	
NAKAWATASE & CO CPAS	
Name 923 SEACOAST DR, IMPERIAL BEACH CA 91932	
Address (Business Address Acceptable)	
Check one <input type="checkbox"/> Trust, go to 2 <input checked="" type="checkbox"/> Business Entity, complete the box, then go to 2	
GENERAL DESCRIPTION OF THIS BUSINESS	
FAIR MARKET VALUE <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: _____/_____/24 ____/_____/24 ACQUIRED DISPOSED
NATURE OF INVESTMENT <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input checked="" type="checkbox"/> CORPORATION Other	
YOUR BUSINESS POSITION PRESIDENT	

2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)	
<input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000

3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)	
<input type="checkbox"/> None or <input checked="" type="checkbox"/> Names listed below	
NAKAWATASE & KAMINSKY CPAS	

4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST	
Check one box: <input type="checkbox"/> INVESTMENT <input checked="" type="checkbox"/> REAL PROPERTY	
923 SEACOAST DR IMPERIAL BEACH CA 91932	
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property	
CPA PRACTICE	
Description of Business Activity or City or Other Precise Location of Real Property	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input checked="" type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: _____/_____/24 ____/_____/24 ACQUIRED DISPOSED
NATURE OF INTEREST <input type="checkbox"/> Property Ownership/Deed of Trust <input type="checkbox"/> Stock <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> Leasehold ____ Yrs. remaining <input type="checkbox"/> Other	
<input type="checkbox"/> Check box if additional schedules reporting investments or real property are attached	

1. BUSINESS ENTITY OR TRUST	
NAKAWATASE & KAMINSKY CPAS	
Name 923 SEACOAST DR, IMPERIAL BEACH CA 91932	
Address (Business Address Acceptable)	
Check one <input type="checkbox"/> Trust, go to 2 <input type="checkbox"/> Business Entity, complete the box, then go to 2	
GENERAL DESCRIPTION OF THIS BUSINESS	
FAIR MARKET VALUE <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: _____/_____/24 ____/_____/24 ACQUIRED DISPOSED
NATURE OF INVESTMENT <input checked="" type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other	
YOUR BUSINESS POSITION PARTNER	

2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)	
<input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000

3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)	
<input type="checkbox"/> None or <input checked="" type="checkbox"/> Names listed below	
HNK CPAS	

4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST	
Check one box: <input type="checkbox"/> INVESTMENT <input checked="" type="checkbox"/> REAL PROPERTY	
1950 CORDELL CT, STE 101 EL CAJON CA 92020	
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property	
CPA PRACTICE	
Description of Business Activity or City or Other Precise Location of Real Property	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input checked="" type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: _____/_____/24 ____/_____/24 ACQUIRED DISPOSED
NATURE OF INTEREST <input type="checkbox"/> Property Ownership/Deed of Trust <input type="checkbox"/> Stock <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> Leasehold 5 Yrs. remaining <input type="checkbox"/> Other	
<input type="checkbox"/> Check box if additional schedules reporting investments or real property are attached	

Comments: _____

SCHEDULE B
Interests in Real Property
(Including Rental Income)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
SHIRLEY NAKAWATASE

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

1410 5TH STREET

CITY

IMPERIAL BEACH

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☒ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☒ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ ☐ _____
Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

567 8TH ST

CITY

IMPERIAL BEACH

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☐ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ ☐ _____
Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☒ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

☐ Guarantor, if applicable

NAME OF LENDER*

BOYS AND GIRLS CLUB OF SOUTH COUNTY

ADDRESS (Business Address Acceptable)

847 ENCINA AVE IMPERIAL BEACH

BUSINESS ACTIVITY, IF ANY, OF LENDER

NON PROFIT

INTEREST RATE

TERM (Months/Years)

4.5_____% ☐ None

10 YEARS

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☒ OVER \$100,000

☒ Guarantor, if applicable

SHIRLEY NAKAWATASE/JEFF BROWN

Comments: _____

SCHEDULE B
Interests in Real Property
(Including Rental Income)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
Name
SHIRLEY NAKAWATASE

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS
1877 ROYSTON AVE

CITY
SAN DIEGO

FAIR MARKET VALUE
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☒ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:
_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NATURE OF INTEREST
☒ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ ☐ _____
Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED
☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☒ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.
☐ None

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

FAIR MARKET VALUE
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:
_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NATURE OF INTEREST
☐ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ ☐ _____
Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED
☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.
☐ None

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE TERM (Months/Years)
_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD
☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000
☐ Guarantor, if applicable

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE TERM (Months/Years)
_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD
☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000
☐ Guarantor, if applicable

Comments: _____

SCHEDULE C
Income, Loans, & Business
Positions
(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name SHIRLEY NAKAWATASE

1. INCOME RECEIVED	1. INCOME RECEIVED
NAME OF SOURCE OF INCOME NAKAWATASE & CO CPAS	NAME OF SOURCE OF INCOME
ADDRESS (Business Address Acceptable) 923 SEACOAST DR IMPERIAL BEACH CA 91932	ADDRESS (Business Address Acceptable)
BUSINESS ACTIVITY, IF ANY, OF SOURCE CPA PRACTICE	BUSINESS ACTIVITY, IF ANY, OF SOURCE
YOUR BUSINESS POSITION PRESIDENT	YOUR BUSINESS POSITION
GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> OVER \$100,000	GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input checked="" type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)	CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)

2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*	INTEREST RATE	TERM (Months/Years)
_____	_____ % <input type="checkbox"/> None	_____
ADDRESS (Business Address Acceptable)	SECURITY FOR LOAN	
_____	<input type="checkbox"/> None <input type="checkbox"/> Personal residence	
BUSINESS ACTIVITY, IF ANY, OF LENDER	<input type="checkbox"/> Real Property _____	Street address
_____		City
HIGHEST BALANCE DURING REPORTING PERIOD	<input type="checkbox"/> Guarantor _____	
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> Other _____	(Describe)
<input type="checkbox"/> \$1,001 - \$10,000		
<input type="checkbox"/> \$10,001 - \$100,000		
<input type="checkbox"/> OVER \$100,000		

Comments: _____

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Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

ZEB

First Name

NAVARRO

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD CLERK OF THE BOARD
2025 SEP 19 PM3:45





Application Timeline

- | | |
|---------------------------|---|
| September 22, 2025 | Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon. |
| September 30, 2025 | Hearing on all applicants. Please plan to attend this meeting. |

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ **Yes, I understand**

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ **Yes, I understand**

INITIAL
HERE: →



A. Tell us About Yourself

First Name: **ZEB**

Last Name: **NAVARRO**

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Phone 2:

E-mail:

Type:

Mobile

Type:

Have you lived at your current address for more than five years?

If no, please list your previous addresses on page 4.

☒ Yes

☐ No



If you have not lived at your current address for more than five years, please list your addresses for the past five (5) years:

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____



B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840): ☒ Yes ☐ No
Select all that apply and attach appropriate verification.
 - ☐ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →



5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No



C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

I am fully qualified to serve as Treasurer-Tax Collector based on my academic preparation, professional experience, and longstanding commitment to public service. My educational background includes a Bachelor of Science in Business Administration, a Master of Business Administration from California State University Monterey Bay, a Master of Public Administration from San Diego State University, and a Doctorate in Education from Northcentral University (now National University).

In addition to these degrees, I have completed the specific coursework required under Administrative Code Section 840, exceeding the 16-unit threshold. My completed coursework includes:

3 units in Principles of Accounting (University of Phoenix)

3 units in Finance for Business (University of Phoenix)

3 units in Finance for Decision Making (University of Phoenix)

3 units in Accounting for Decision Making (University of Phoenix)

6 units in Accounting and Finance (California State University Monterey Bay)

3 units in Public Financial Management (San Diego State University)

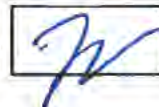
3 units in Finance and Facilities Management (Concordia University – Portland)

Altogether, these courses demonstrate a comprehensive foundation in accounting, finance, and fiscal management.

Beyond academic preparation, I bring over 20 years of professional experience in the public sector as both a manager and an educator. I currently serve as the elected City Clerk for the City of Oceanside, where I oversee complex administrative operations, public records, elections, and budget responsibilities with transparency and accountability. In higher education, I teach Public Finance and Budgeting at Franklin University in Columbus, Ohio, further reinforcing my expertise in governmental finance and fiscal policy.

My combined experience ensures that I can carry out the responsibilities of Treasurer-Tax Collector with integrity and competence. I am committed to ensuring the office provides exceptional customer service, operates with transparency, and safeguards the public's tax dollars through prudent fiscal management and sound investment practices.

With my academic achievements, extensive financial training, and proven leadership in public service, I am confident in my ability to serve effectively as Treasurer-Tax Collector.



3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

I seek appointment to the office of San Diego County Treasurer-Tax Collector because I am deeply committed to public service and dedicated to ensuring the highest standards of transparency, accountability, and accessibility in government. My professional background, combined with my philosophy of servant leadership, uniquely positions me to advance the mission of this office in serving the people of San Diego County.

As the elected City Clerk for the City of Oceanside, I have successfully overseen programs and initiatives designed to strengthen public trust and enhance transparency. From modernizing records management systems to ensuring compliance with open government laws, my work has focused on building confidence between residents and their local government. These experiences have prepared me to bring the same level of openness, efficiency, and integrity to the Treasurer-Tax Collector's office.

At the heart of my leadership approach is servant leadership—a belief that those in public office exist to serve others, not themselves. This philosophy has guided my work as a public official and as an educator, where I teach subjects such as public finance and administration. In both roles, I strive to empower individuals through knowledge, access, and fairness, creating opportunities for the public to fully understand and engage with the systems that affect their daily lives.

As an educator, I also recognize the importance of outreach and education in financial matters. The Treasurer-Tax Collector's office plays a vital role in the financial health of our county, and I am committed to ensuring that residents understand how the office works for them. Whether through clear communication, public workshops, or community engagement, I will prioritize efforts to help taxpayers navigate processes, make informed financial decisions, and see the office as a resource rather than simply a point of transaction.

My interest to be appointed is motivated not only by my qualifications, but by my genuine desire to serve. I believe that government should be responsive, transparent, and rooted in integrity, and I am eager to apply my professional expertise, academic knowledge, and personal commitment to strengthen public confidence in the Treasurer-Tax Collector's office.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, **ZEB NAVARRO**, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 17th day of SEPTEMBER, 2025, at OCEANSIDE, California.

Signature:

E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☐ Current resume containing, at a minimum, all employment for the past five years; and
- ☐ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.

Date Issued: 04/05/2017
 Record of: ZEBEDEE R. NAVARRO
 Student Number: [REDACTED]
 Birthdate: [REDACTED]
 Enrollment Status: Graduated
 Effective Date: 03/19/2012



SENT TO:
 ZEBEDEE NAVARRO
 [REDACTED]

Prior Schools Attended	Credits	Degrees
PALOMAR COLLEGE	42.00	Associate in Arts De
PALOMAR COLLEGE	81.00	Associate in Arts De

Mo/Year	Course ID	Course Title	Grade	Credits Attempted	Credits Earned	Quality Points	Rep
UNIVERSITY OF PHOENIX							
11/2009	GEN/200	FOUNDATIONS FOR GENERAL EDUCATION AND PROFESSIONAL SUCCESS	A	3.00	3.00	12.00	
01/2010	ECO/212	PRINCIPLES OF ECONOMICS	A-	3.00	3.00	11.01	
02/2010	BIS/219	BUSINESS INFORMATION SYSTEMS	A-	3.00	3.00	11.01	
03/2010	MGT/216	ORGANIZATIONAL ETHICS AND SOCIAL RESPONSIBILITY	A-	3.00	3.00	11.01	
05/2010	ACC/280	PRINCIPLES OF ACCOUNTING	A	3.00	3.00	12.00	
06/2010	COM/285	BUSINESS COMMUNICATIONS	A	3.00	3.00	12.00	
07/2010	MGT/330	MANAGEMENT THEORY, PRACTICE, AND APPLICATION	A	3.00	3.00	12.00	
08/2010	MGT/307	ORGANIZATIONAL BEHAVIOR AND GROUP DYNAMICS	A	3.00	3.00	12.00	
10/2010	MGT/350	CRITICAL THINKING: STRATEGIES IN DECISION MAKING	A	3.00	3.00	12.00	
11/2010	RES/341	RESEARCH AND EVALUATION I	A-	3.00	3.00	11.01	
01/2011	RES/342	RESEARCH AND EVALUATION II	B	3.00	3.00	9.00	
02/2011	FIN/370	FINANCE FOR BUSINESS	A-	3.00	3.00	11.01	
03/2011	BUS/415	BUSINESS LAW	A	3.00	3.00	12.00	
04/2011	MKT/421	MARKETING	A	3.00	3.00	12.00	
05/2011	BUS/475	INTEGRATED BUSINESS TOPICS	A	3.00	3.00	12.00	
07/2011	MGT/437	PROJECT MANAGEMENT	A-	3.00	3.00	11.01	
08/2011	FIN/419	FINANCE FOR DECISION MAKING	A	3.00	3.00	12.00	
09/2011	ECO/415	APPLIED ECONOMICS IN BUSINESS	A-	3.00	3.00	11.01	
10/2011	ISCOM/305	SYSTEMS OPERATIONS MANAGEMENT	A	3.00	3.00	12.00	
11/2011	ACC/400	ACCOUNTING FOR DECISION MAKING	A	3.00	3.00	12.00	
01/2012	MGT/488	STRATEGIC BUSINESS MANAGEMENT AND PLANNING	A	3.00	3.00	12.00	
02/2012	PSY/425	CHEMICAL DEPENDENCY IN THE WORKPLACE	A	3.00	3.00	12.00	
				GPA	Credits Attempted	Credits Earned	Quality Points
Total Cumulative Credits:						66.00	
UOPX Cumulative: 3.85				66.00	66.00	254.07	



Date Issued: 04/05/2017
Record of: ZEREDEE R, NAVARRO
Student Number: [REDACTED]
Birthdate: [REDACTED]
Enrollment Status: Graduated
Effective Date: 03/19/2012



BSB/A Program GPA 3.85

UNIVERSITY OF PHOENIX
DEGREES, CERTIFICATES

BACHELOR OF SCIENCE IN BUSINESS: COMPLETED 03/19/2012, CONFERRED 03/2012
GRADUATED WITH HONORS
CONCENTRATION IN ADMINISTRATION

*****End of Transcript*****



Page 2 of 2

AN OFFICIAL SIGNATURE IS WHITE WITH A BLUE BACKGROUND

A RAISED SEAL IS NOT REQUIRED

This officially sealed and signed transcript is printed on blue SCRIP-SAFE® security paper with the name of the university printed in white type across the face of the document. When photocopied, the name of the institution appears on one line and the word "COPY" appears on the next. A BLACK ON WHITE OR A COLOR COPY SHOULD NOT BE ACCEPTED!

Audra McQuarrie, Registrar



137

CALIFORNIA STATE UNIVERSITY MONTEREY BAY

Name: Zebedee Navarro
Student ID: [REDACTED]

Print Date: 04/06/2017
Alternate ID: [REDACTED]
Birthdate: [REDACTED]

Degrees Awarded
Degree: Master of Business Administration
Plan: Business Administration
Confer Date: 12/21/2014

	Attempted	GPA Units	Earned	Points
Term GPA	4.000		6.000	24.000
CSUMB GPA	3.880		30.000	116.400
All College GPA	3.880		30.000	116.400

Academic Standing Effective 01/08/2014: Good Standing

Beginning of Postbaccalaureate Record

Spring 2014
Program: Ex Ed Graduate
Plan: Business Administration Major

Course	Description	Attempted	GPA Units	Earned	Grade	Points
BUS 626	Marketing & Entrepreneurship	6.0	6.0	6.0	A	24.000
BUS 631	Global Business	6.0	6.0	6.0	A	24.000

	Attempted	GPA Units	Earned	Points
Term GPA	4.000		12.000	48.000
CSUMB GPA	3.914		42.000	164.400
All College GPA	3.914		42.000	164.400

Academic Standing Effective 06/19/2014: Good Standing

Summer 2014
Program: Ex Ed Graduate
Plan: Business Administration Major

Course	Description	Attempted	GPA Units	Earned	Grade	Points
BUS 691	Business Strategy	6.0	6.0	6.0	A	24.000

	Attempted	GPA Units	Earned	Points
Term GPA	4.000		6.000	24.000
CSUMB GPA	3.925		48.000	188.400
All College GPA	3.925		48.000	188.400

Postbaccalaureate Career Totals

	Attempted	GPA Units	Earned	Points
CSUMB GPA	3.925		48.000	188.400
All College GPA	3.925		48.000	188.400

Fall 2012
Program: Ex Ed Graduate
Plan: Business Administration Major

Course	Description	Attempted	GPA Units	Earned	Grade	Points
BUS 601	MBA Fundamentals	6.0	6.0	6.0	A	24.000

	Attempted	GPA Units	Earned	Points
Term GPA	4.000		6.000	24.000
CSUMB GPA	4.000		6.000	24.000
All College GPA	4.000		6.000	24.000

Academic Standing Effective 01/10/2012: Good Standing

Spring 2013
Program: Ex Ed Graduate
Plan: Business Administration Major

Course	Description	Attempted	GPA Units	Earned	Grade	Points
BUS 632	Organization & Leadership	6.0	6.0	6.0	A	24.000
BUS 687	Accounting & Finance	6.0	6.0	6.0	A-	22.200

	Attempted	GPA Units	Earned	Points
Term GPA	3.850		12.000	46.200
CSUMB GPA	3.900		18.000	70.200
All College GPA	3.900		18.000	70.200

Academic Standing Effective 06/21/2013: Good Standing

Summer 2013
Program: Ex Ed Graduate
Plan: Business Administration Major

Course	Description	Attempted	GPA Units	Earned	Grade	Points
BUS 602	Micro-Macro Economics	6.0	6.0	6.0	A-	22.200

	Attempted	GPA Units	Earned	Points
Term GPA	3.700		6.000	22.200
CSUMB GPA	3.350		24.000	92.400
All College GPA	3.350		24.000	92.400

Academic Standing Effective 10/24/2013: Good Standing

Fall 2013
Program: Ex Ed Graduate
Plan: Business Administration Major

Course	Description	Attempted	GPA Units	Earned	Grade	Points
BUS 661	Innovation & Tech Leadership	6.0	6.0	6.0	A	24.000



SAN DIEGO STATE UNIVERSITY
OFFICIAL TRANSCRIPT

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Patent 5,772,248

ARS=C

PRINT DATE: 04/06/2017

PAGE: 1

STUDENT NAME: NAVARRO, ZEBEDEE ROCKY

CAMPUS ID :

SSN :

BIRTH DATE MONTH/DAY:

TRANSFER CREDIT

INSTITUTION	TO DATE	SEMESTER ATTEMPT	UNITS ACCEPT	GRADE POINTS	
PALOMAR COLL	05/11	RECORD	ON FILE	*	
U PHOENIX	03/12	0.0	0.0	0.0	DEGREE AWARDED: BS
CSU MONTEREY BAY	08/14	0.0	0.0	0.0	DEGREE AWARDED: MBA
SIMS/R TRANSFER TOTALS		0.0	0.0	0.0	GPA:0.00

* MAXIMUM 70.0 UNITS ALLOWED FROM COMMUNITY COLLEGES COURSES

GRADUATE RECORD

SPECIAL SESSION FALL 2015

P A	0600	SCOPE OF PUBLIC ADMIN	UA	UE	GRADE	PTS	REF
P A	0604	METH OF ANALYS PUB AFFAIR	3.0	3.0	A-	11.1	
P A	0606	SEM QUANT APPROACHES P A	3.0	3.0	A	12.0	
P A	0630	SEM PUBLIC PERSON ADMIN	3.0	3.0	A	12.0	

TERM TOTALS:

12.0 12.0 46.2 GPA: 3.85

SDSU CUMULATIVE TOTALS:

12.0 12.0 46.2 GPA: 3.85

SPECIAL SESSION SPRING 2016

P A	0531	GOV EMPLOYER-EMPLOYEE REL	UA	UE	GRADE	PTS	REF
P A	0620	SEM MANAGEMENT URBAN GOVT	3.0	3.0	A	12.0	Z
P A	0640	ASSESNG GOV NONPROFT PERF	3.0	3.0	A	12.0	
P A	0660	ADMIN&PUBLIC POLICY DEVEL	3.0	3.0	A	12.0	

TERM TOTALS:

12.0 12.0 48.0 GPA: 4.00

SDSU CUMULATIVE TOTALS:

24.0 24.0 94.2 GPA: 3.92

SPECIAL SESSION SUMMER 2016

P A	0642	SEMINAR IN ADMIN THEORY	UA	UE	GRADE	PTS	REF
P A	0650	SEM PUBLIC FINANCIAL MGMT	3.0	3.0	A-	11.1	

TERM TOTALS:

6.0 6.0 23.1 GPA: 3.85

SDSU CUMULATIVE TOTALS:

30.0 30.0 117.3 GPA: 3.91

SPECIAL SESSION FALL 2016

UA	UE	GRADE	PTS	REF
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* * * * CONTINUED ON NEXT PAGE * * * *

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CERTIFIED TO BE A CORRECT TRANSCRIPT OF RECORD.
STUDENT IN GOOD STANDING UNLESS OTHERWISE INDICATED.
TRANSCRIPT VOID IF ALTERED.



ZEBEDEE NAVARRO

Layanne Williams
REGISTRAR

SAN DIEGO STATE UNIVERSITY
SAN DIEGO, CALIFORNIA 92182-7453
(619) 594-0266

SAN DIEGO STATE UNIVERSITY
OFFICIAL TRANSCRIPT

TamperSafe®

Patent 5,772,248

ARS=C

PRINT DATE: 04/06/2017

PAGE: 2

STUDENT NAME: NAVARRO, ZEBEDEE ROCKY

CAMPUS ID :

SSN :

BIRTH DATE MONTH/DAY:

P A	0632	SEM ORG DEVEL PUB SECTOR	3.0	3.0	A	12.0	
P A	0798	SPECIAL STUDY	0.0	3.0	CR	0.0	CR/NCR

TERM TOTALS: 3.0 6.0 12.0 GPA: 4.00

SDSU CUMULATIVE TOTALS: 33.0 36.0 129.3 GPA: 3.91

TRANSFER CUMULATIVE TOTALS: 0.0 0.0 0.0 GPA: 0.00

OVERALL CUMULATIVE TOTALS: 33.0 36.0 129.3 GPA: 3.91

+ DECEMBER 30, 2016 AWARDED MASTER'S DEGREE +

+ DEGREE: MPA +

+ MAJOR : PUBLIC ADMINISTRATION +

*** END OF ACADEMIC RECORD ***

EFFECTIVE SPRING 1998: OPEN UNIVERSITY EQUALS RESIDENCE CREDIT

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security paper and does not require a raised seal.

CERTIFIED TO BE A CORRECT TRANSCRIPT OF RECORD.
STUDENT IN GOOD STANDING UNLESS OTHERWISE INDICATED.
TRANSCRIPT VOID IF ALTERED.

ZEBEDEE NAVARRO

Layanne Williams
REGISTRAR



SAN DIEGO STATE UNIVERSITY
SAN DIEGO, CALIFORNIA 92182-7453
(619) 594-0266

Student No: [REDACTED]

Date of Birth: [REDACTED]

Date Issued: 04-AUG-2020
OFRecord of: Zebedee Navarro
Issued To: Concordia Univ St Paul
St Paul, MN


Page: 1

Course Level: Graduate

Current Program

Major : Higher Education

SUBJ NO.	COURSE TITLE	CRED GRD	PTS R	SUBJ NO.	COURSE TITLE	CRED GRD	PTS R
INSTITUTION CREDIT:				Institution Information continued:			
Summer Semester 2017				Ehrs: 6.50 GPA-Hrs: 6.50 Qpts: 25.85 GPA: 3.98			
EDDC 600A	NINE LIVES OF SCHOL WRIT I	0.50 A	2.00	Cum: 24.00 GPA-Hrs: 24.00 Qpts: 95.85 GPA: 3.99			
EDDC 615	THE ETHICAL EDUCATOR	3.00 A	12.00	Fall Semester 2018			
Ehrs: 3.50 GPA-Hrs: 3.50 Qpts: 14.00 GPA: 4.00				EDDH 623	HIGHER ED:CURRICULUM & LDRSH	3.00 A	12.00
Cum: 3.50 GPA-Hrs: 3.50 Qpts: 14.00 GPA: 4.00				EDDH 630	HIGHER ED:FINACE & FACILTS MGMT	3.00 A	12.00
Fall Semester 2017				Ehrs: 6.00 GPA-Hrs: 6.00 Qpts: 24.00 GPA: 4.00			
EDDC 600B	NINE LIVES OF SCHOL WRIT I	0.50 A	2.00	Cum: 30.00 GPA-Hrs: 30.00 Qpts: 119.85 GPA: 4.00			
EDDC 602A	NINE LIVES OF SCHOL WRIT II	0.50 A	2.00	Spring Semester 2019			
EDDC 605	TRANSFORMATIONAL LEARNING	3.00 A	12.00	EDDH 633	HIGHER ED:HUMN ISS,ACCT&ADMIN	3.00 A	12.00
EDDC 620	CREATIVITY, INQUIRY & INNOVAT	3.00 A	12.00	EDDH 638	HIGHER EDUCATION LAW	3.00 A	12.00
Ehrs: 7.00 GPA-Hrs: 7.00 Qpts: 28.00 GPA: 4.00				Ehrs: 6.00 GPA-Hrs: 6.00 Qpts: 24.00 GPA: 4.00			
Cum: 10.50 GPA-Hrs: 10.50 Qpts: 42.00 GPA: 4.00				Cum: 36.00 GPA-Hrs: 36.00 Qpts: 143.85 GPA: 4.00			
Spring Semester 2018				Summer Semester 2019			
EDDC 602B	NINE LIVES OF SCHOL WRIT II	0.50 A	2.00	EDDH 640	TECH & REV IN HIGHER ED	3.00 A	12.00
EDDC 603A	NINE LIVES OF SCHOL WRIT III	0.50 A	2.00	EDDT 653	RELIGION AND DENSE MEANING	4.00 A	16.00
EDDC 608	QUANTITATIVE RESEARCH METHODS	3.00 A	12.00	Ehrs: 7.00 GPA-Hrs: 7.00 Qpts: 28.00 GPA: 4.00			
EDDC 618	LEADING ORGANIZATIONAL CHANGE	3.00 A	12.00	Cum: 43.00 GPA-Hrs: 43.00 Qpts: 171.85 GPA: 4.00			
Ehrs: 7.00 GPA-Hrs: 7.00 Qpts: 28.00 GPA: 4.00				Fall Semester 2019			
Cum: 17.50 GPA-Hrs: 17.50 Qpts: 70.00 GPA: 4.00				EDDR 610	SCHOLARS BEFORE RESEARCH I	2.00 P	0.00
Summer Semester 2018				EDDR 619	SCHOLARS BEFORE RESEARCH II	2.00 P	0.00
EDDC 603B	NINE LIVES OF SCHOL WRIT III	0.50 A-	1.85	Ehrs: 4.00 GPA-Hrs: 0.00 Qpts: 0.00 GPA: 0.00			
EDDC 611	QUALITATIVE RESEARCH METHODS	3.00 A	12.00	Cum: 47.00 GPA-Hrs: 43.00 Qpts: 171.85 GPA: 4.00			
EDDH 621	CRITICAL ISSUES IN HIGHER ED	3.00 A	12.00	***** CONTINUED ON PAGE 2 *****			
***** CONTINUED ON NEXT COLUMN *****							


 Registrar
 Concordia University St. Paul Custodial Institution

Student No: [REDACTED]

Date of Birth: [REDACTED]

Date Issued: 04-AUG-2020
OF

Record of: Zebedee Navarro
Level: Graduate

Page: 2

SUBJ NO.	COURSE TITLE	CRED GRD	PTS R
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Institution Information continued:

Spring Semester 2020

EDDR 620	IRM I	2.00 P	0.00
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Ehrs: 2.00	GPA-Hrs: 0.00	Qpts: 0.00	GPA: 0.00
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Cum: 49.00	GPA-Hrs: 43.00	Qpts: 171.85	GPA: 4.00
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Good Standing

***** TRANSCRIPT TOTALS *****

	Earned Hrs	GPA Hrs	Points	GPA
TOTAL INSTITUTION	49.00	43.00	171.85	4.00

TOTAL TRANSFER	0.00	0.00	0.00	0.00
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OVERALL	49.00	43.00	171.85	4.00
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***** END OF TRANSCRIPT *****

[Signature]
Approved
DePaul University St. Paul, Ontario Institution

CONCORDIA UNIVERSITY
Office of the Registrar
 2811 NE Holman St – Portland, OR 97211

ACCREDITATION

Concordia University was accredited by the Northwest Commission on Colleges and Universities (NWCCU) through December 2020, following university closure.

INSTITUTIONAL HISTORY

1905 – The school begins as a four-year academy to meet the needs of the area for pastors and parochial school teachers for the Lutheran Church.¹

1950 – The junior college department for men is introduced - The name was changed from Concordia Academy to Concordia College.

1954 – Concordia adds the co-educational program.

1962 – Concordia becomes accredited by the Northwest Association of Schools and Colleges (NASC).

1971 – Concordia converts to a quarter calendar.

1977 – Concordia becomes a four-year college.

1980 – Concordia's first students graduate with Baccalaureate Degrees.

1993 – Concordia joins the Concordia University System.

1995 – The school name changes to Concordia University and converts to a semester calendar.

1996 – Concordia is approved for graduate programs.

2004 – The NASC becomes the NWCCU.

2012 – Concordia University School of Law opens to students in Boise, Idaho.

2020 – Concordia University – Portland ceases operation.

¹ All transcripts are for Concordia University unless Concordia High School is specifically stated on the transcript

COURSE CREDIT

Fall 1905 – Summer 1971	Semester Calendar ³
Fall 1971 – Summer 1995	Quarter Calendar ³
Fall 1995 – Present	Semester Calendar ³

³Unless otherwise noted

PRIOR LEARNING ASSESSMENT

Concordia University has authorized a policy for assessment of prior experiential learning for credit through portfolio review.

GRADING SYSTEM

School of Law courses are graded on a numerical system, the scale ranging from 4.3 to 0.0. For all other programs, the grades and quality points for the grading system are as follows:

Grade	Quality Points
A	4.0
A-	3.7
B+	3.3
B	3.0
B-	2.7
C+	2.3
C	2.0
C-	1.7
D+	1.3
D	1.0
D-	0.7
F	0.0
AU Audit	None
CIP In-progress ⁴	None
I Incomplete ⁵	None
N No Count	None
NP No Pass	None
P Pass ("C" or better)	None
RD Registrar Delay	None
W Withdraw	None
X No basis for grade	None

⁴Courses that extend beyond one semester.

⁵Students who receive an incomplete in a course will have a grade of I, in which "I" represents the backup grade the student has earned based on the course work completed. Normally, the grade will be changed to this backup grade if the student does not complete the course work by the end of the following semester.

COURSE NUMBERS

000-099 Non-baccalaureate (prior to 1996, all courses with an ELS prefix are also considered non-baccalaureate)

100-299 Lower division

300-499 Upper division

500-699 Graduate

800 Limited graduate seminar credit

400-level courses denoted with a "G" may meet graduate level course requirements at certain institutions with cooperative programs.

REPEATED COURSES

In such cases, the new grade and credit will replace the original in the calculation of the GPA. In the "R" column, "E" indicates excluded and "I" indicates included grade. Both occurrences and grades will remain on the permanent academic record.

CONTINUING EDUCATION COURSES

Courses designated with a CEU prefix reflect ten contact hours of participation per one hour of credit. CEUs may not be applied toward any Concordia University degree or certificate. "P" indicates completion of the requisite hours.

ACADEMIC STANDING

All students are considered to be in good standing unless otherwise noted. Since Fall of 1999, in order to remain academically eligible for enrollment, an undergraduate student must maintain a minimum cumulative and term grade point average of 2.00. Graduate students must maintain a cumulative and term grade point average of 3.00 to remain in good standing.

DEAN'S LIST/GRADUATION HONORS

Undergraduate students who attain a grade point average of 3.50 with a minimum of 12 units attempted for a semester are placed on the Dean's List. Since Fall of 1991, graduation honors are awarded on the undergraduate student's academic work at Concordia. They are awarded with three grades of distinction according to the following formula: summa cum laude – a 3.90 GPA; magna cum laude – a 3.70 GPA; cum laude – a 3.50 GPA.

GRADUATION REQUIREMENTS

Baccalaureate degrees require the completion of General Education Requirements, departmental requirements and a minimum of 124 semester credits of which 45 must be upper division. Masters degrees require a minimum of 30 semester credits of graduate level courses.

TRANSCRIPTS AND CONFIDENTIALITY OF RECORDS

Concordia University follows the policies of the American Association of College Registrars and Admissions Officers (AACRAO) with regard to the content and release of student records. This transcript of academic record is subject to the Family Educational Rights and Privacy Act of 1974, as amended. It is furnished for official use only. Official transcripts show the university's authorized signature and the college seal and are sealed in an official envelope; unofficial copies are marked "unofficial." Third parties are not authorized to release this transcript to other entities.

Concordia University – Portland ceased operation at the conclusion of the Spring 2020 academic semester, with exception to the following programs concluding following Summer 2020 academic semester: undergraduate HSEM, M.Ed. online accelerated track, and the School of Law.

AUTHENTICITY: Concordia University's Board of Regents elected Concordia University – St. Paul as custodial institution for Portland's academic records. Production and authenticity of all records and official transcript(s) is determined by Concordia University – St. Paul as custodial institution, will be produced by an approved third-party processor and/or bear the official seal of Concordia University – Portland.

This document cannot be released to a third party without the written consent of the student. This is in accordance with the Family Educational Rights and Privacy Act of 1974. If you have any questions about this document, please contact Concordia University – St. Paul. PLEASE NOTE: Alteration of this document may be a criminal offense.

ZEB NAVARRO, CMC, Ed.D.

EDUCATION

Doctor of Education Northcentral University Dissertation: <i>A Qualitative Case Study on Online Adult Learners' Perceptions Toward Digital Isolation in a California Community College</i>	05/2021
Master of Public Administration San Diego State University	12/2016
Master of Business Administration California State University, Monterey Bay	12/2014
Bachelor of Science, Business Administration University of Phoenix Graduated with Honors	03/2012
Associate of Arts, Radio and Television Palomar College	05/2005

PROFESSIONAL EXPERIENCE

City of Oceanside, Oceanside, CA

City Clerk

02/2019 – present

Department director of the City Clerk's Office of the City of Oceanside. Serve as the city's head elections official, head records administrator, head archivist, and director of legislative services. Serve as clerk and secretary for the Oceanside City Council, Oceanside Harbor District, Oceanside Community Development Commission, Oceanside Finance Authority, and Manufactured Homes Fair Practices Commission. Maintain, publish, and archive meeting minutes and documentation. Maintain records and archives including certification, indexing, filing, and destruction of all records and preservation of historical documents and artifacts. Process public records requests and coordination of releasing responsive records with City Attorney's Office. Attest, publish, and post city ordinances and resolutions including maintaining City's Municipal Code. Supervise and chair all bid processes for the City including bid openings and maintenance of contracts. Work with multiple departments for the processing and publishing of legal notices. Conduct all municipal and special elections in accordance with state law and publish information guides on election processes. Responsible for document imaging and administering a retention schedule for all city documents. Serve as the liaison between the public and the Mayor and City Council. Serve as the City's compliance officer for federal, state, and local statutes including the Political Reform Act, the Brown Act, and the Public Records Act. Responsible for citywide re-districting process for elections and compliance with Fair Maps Act. Produce local public service announcements for board and commission recruitment with local

public access station KOCT-TV. Train and assist City staff on Brown Act requirements, parliamentary procedures, and processing public records requests.

College Radio Foundation, Hewitt, NJ

08/2018 – 08/2023

Vice-President

Served as vice-president of a national non-profit promoting college radio and responsible for organizing World College Radio Day. Lobbied and promoted the importance of college radio to local, state, and federal agencies, representatives, and stakeholders. Worked with the Federal Communications Commission on advancing college radio causes and testified on behalf of college radio stations in Washington, D.C. Actively communicated and networked with college radio stations to generate feedback on current issues. Helped colleges with establishing radio stations on campus. Worked with international counterparts in organizing World College Radio Day including generating content for a global simulcast including arranging interviews. Previous World College Radio Day guests included “Weird Al” Yankovic, Coldplay, Joan Jett, Brett Michaels, Dr. Demento, Ed Asner, Steven Van Zandt, and Mike Myers.

Palomar College, San Marcos, CA

Manager, Radio Station

04/2007 – present

Interim Manager, Radio Station

08/2006 – 04/2007

Responsible for daily operations and budgeting of a federally licensed radio broadcast facility and student lab. Train on-air staff and students on Federal Communications Commission (FCC) rules and regulations, equipment operation, and software applications. Work with student staff on programming, music, promotion, social media, and production aspects of the station. Ensure compliance with FCC guidelines including on-air content, frequency strength, Emergency Alert System (EAS) operations, and transmitter tower maintenance. Developed marketing and promotional materials for the station. Provide technical support for equipment and software. Supervised facility upgrades of radio station with the addition of performance space for live bands and music. Developed training and operation manuals for students. Guide and mentor students in developing on-air skills and production techniques. Conduct audience research for the creation of marketing strategies. Researched new software and equipment to keep the station current with industry trends. Participate in budget development and administration including analyzing need for additional funding and monitoring expenditures. Examined and evaluated data for program review and planning including monitoring student enrollment, goal milestones, and requesting resources. Guided the station to win Best Community College Radio Station in the Nation in 2015, 2017, 2019, and 2020. Oversaw station’s successful FCC license renewals in 2012 and 2021. Member of Professional Growth Program Committee, 2024 Educational Master Plan Committee, Enrollment Strategies Task Force, and past member of Instructional Planning Council and Human Resources Planning Council. Winner of the 2016 National Outstanding Faculty Adviser Award for Radio.

Peralta Community College District, Peralta, CA

Social Media Marketing Consultant and Trainer

07/2018 – 03/2019

Responsible for all social media marketing for the Peralta Community College District’s four colleges: Berkeley City College, Laney College, Merritt College, and College of Alameda. Created and implemented strategic social media marketing plan utilizing social media platforms (Facebook, Instagram, Twitter, TikTok, and Snapchat) and created buy-in from various

stakeholders across all colleges in the District. Worked with executive administration in the development of strategic social media marketing plan and generated feedback from college faculty. Created training manual and videos to help key personnel in the maintenance of social media accounts and provided technical support. Provided expertise regarding copyright and free-speech issues regarding social media. Identified low-enrolled classes to promote through enrollment analysis leading to an increase in enrollment. Created commercial copy and marketing collateral to help in the development of social media content. Trained staff on how to utilize various social media platforms.

TEACHING AND RELATED EXPERIENCE

Franklin University, Columbus, OH
Adjunct Faculty/Doctoral Faculty Advisor
Political Science and Public Administration

03/2022 – present

Teaching in the online Master of Public Administration and Bachelor of Public Administration programs. Courses taught include political science, U.S. government, public administration, non-profit management, and public finance and budgeting. Serve as capstone advisor for Master of Public Administration students. Serve on dissertation committees for doctoral students. Courses taught via Canvas with Zoom and Microsoft Teams utilized for virtual office hours, student presentations, and synchronous lectures.

Palomar College, San Marcos, CA
Adjunct Faculty, Media Studies Department

08/2018 – present

08/2005 – 05/2006

Teaching online, hybrid, and in-person courses in media studies, mass communication, radio production, and radio station operations and management. Developed online curriculum and converted in-person courses into online courses during COVID pandemic. Serve on instructional advisory committee for Media Studies Department, participate in curriculum development and review, oversee student academic work for broadcast, and participate in instructional planning. Member of college's accreditation review team. Boosted enrollment in classes through marketing and outreach. Nominated for Palomar College Distinguished Faculty Award and winner of a national faculty award in broadcast education. Courses taught via Canvas and previously on Blackboard. Zoom, Skype, and Microsoft Teams are used for virtual office hours.

University of the People, Pasadena, CA
Adjunct Faculty/Thesis Advisor
College of Education

09/2021 – 03/2024

Taught graduate-level courses in the Master of Education program. Courses taught include learning theory, global education, removing barriers to education, research methodologies, and curriculum design. Served as faculty thesis advisor for students in capstone courses and supervised research. Courses taught via Moodle with Microsoft Teams utilized for virtual office hours.

CERTIFICATIONS

Certified Municipal Clerk, International Institute of Municipal Clerks
Notary Public, State of California Commission #2416918
Registered Technician, Federal Communications Commission
Social and Behavioral Research Certification, CITI Program

AWARDS AND RECOGNITIONS

2023 – Nominee, Distinguished Faculty Award, Palomar College
2019 – Nominee, Distinguished Faculty Award, Palomar College
2019 – Finalist, Best Elected Official, *San Diego CityBeat*
2018 – Nominee, Best Training Method, Intercollegiate Broadcasting System
2018 – Outstanding Service Award, World College Radio Day
2016 – **Winner**, Jeff Tellis Award for Outstanding Faculty Advisor (Radio), Intercollegiate Broadcasting System
2016 – Nominee, Employee of the Year, Palomar College
2015 – Nominee, Jeff Tellis Award for Outstanding Advisor (Radio), Intercollegiate Broadcasting System
2014 – Nominee, Employee of the Year, Palomar College
2013 – Nominee, Employee of the Year, Palomar College

PROFESSIONAL ORGANIZATIONS

Los Angeles Breakfast Club
San Diego County Bar Association
National Notary Association
Association of Records Managers and Administrators (ARMA) International
International Institute of Municipal Clerks
California Municipal Clerks Association
American Cinematheque
Intercollegiate Broadcasting System
Broadcast Education Association

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
NAVARRO ZEBEDEE ROCKY

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

COUNTY OF SAN DIEGO

TREASURER - TAX COLLECTOR

Division, Board, Department, District, if applicable

Your Position

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County

☒ County of SAN DIEGO

☐ City of

☐ Other

3. Type of Statement (Check at least one box)

☐ Annual: The period covered is January 1, 2024, through
December 31, 2024.

☐ Leaving Office: Date Left / /
(Check one circle below.)

-or-

The period covered is / / through
December 31, 2024.

☐ The period covered is January 1, 2024, through the date of
leaving office.

-or-

☐ Assuming Office: Date assumed / /

☐ The period covered is / / through
the date of leaving office.

☒ Candidate: Date of Election 9/30/25 and office sought, if different than Part 1: TREASURER/TAX-COLLECTOR

4. Schedule Summary (required)

► Total number of pages including this cover page: 2

Schedules attached

☐ Schedule A-1 - Investments - schedule attached

☒ Schedule C - Income, Loans, & Business Positions - schedule attached

☐ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☐ Schedule B - Real Property - schedule attached

☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- ☐ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER

EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed

9/18/25
(month, day, year)

Signature

SCHEDULE C
Income, Loans, & Business
Positions
(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

ZEBEDEE NAVARRO

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

PALOMAR COLLEGE

ADDRESS (Business Address Acceptable)

1140 W. MISSION RD. SAN MARCOS CA 92001

BUSINESS ACTIVITY, IF ANY, OF SOURCE

EDUCATION

YOUR BUSINESS POSITION

MANAGER/ADJUNCT FACULTY

GROSS INCOME RECEIVED

☐ No Income - Business Position Only

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☒ \$10,001 - \$100,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☒ Salary ☐ Spouse's or registered domestic partner's income
(For self-employed use Schedule A-2.)

☐ Partnership (Less than 10% ownership. For 10% or greater use
Schedule A-2.)

☐ Sale of _____
(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or ☐ Rental Income, list each source of \$10,000 or more

(Describe)

☐ Other _____
(Describe)

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

FRANKLIN UNIVERSITY

ADDRESS (Business Address Acceptable)

201 S. GRANT, COLUMBUS, OH 43215

BUSINESS ACTIVITY, IF ANY, OF SOURCE

EDUCATION

YOUR BUSINESS POSITION

ADJUNCT FACULTY

GROSS INCOME RECEIVED

☐ No Income - Business Position Only

☐ \$500 - \$1,000

☒ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☒ Salary ☐ Spouse's or registered domestic partner's income
(For self-employed use Schedule A-2.)

☐ Partnership (Less than 10% ownership. For 10% or greater use
Schedule A-2.)

☐ Sale of _____
(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or ☐ Rental Income, list each source of \$10,000 or more

(Describe)

☐ Other _____
(Describe)

► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

INTEREST RATE

_____% ☐ None

TERM (Months/Years)

SECURITY FOR LOAN

☐ None ☐ Personal residence

☐ Real Property _____
Street address

City

☐ Guarantor _____

☐ Other _____
(Describe)

Comments: _____

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Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

Christian

First Name

Peacox

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD CLERK OF THE BOARD
2025 SEP 18 PM2:39



Application Timeline

- | | |
|---------------------------|---|
| September 22, 2025 | Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon. |
| September 30, 2025 | Hearing on all applicants. Please plan to attend this meeting. |

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ Yes, I understand

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ Yes, I understand

CP

A. Tell us About Yourself

First Name: Christian

Last Name: Peacox

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Phone 2:

E-mail:

Type:

Mobile

Type:

Have you lived at your current address for more than five years?

☒ Yes ☐ No

If no, please list your previous addresses on page 4.

If you have not lived at your current address for more than five years, please list your addresses for the past five (5) years:

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

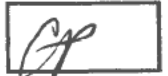
1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840): ☒ Yes ☐ No
Select all that apply and attach appropriate verification.
 - ☐ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

CP

5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No



C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

I am honored to submit my qualifications for consideration to serve as San Diego County Treasurer-Tax Collector. My background combines professional finance expertise, entrepreneurial leadership, and public service as an elected municipal treasurer, providing the experience and perspective necessary to safeguard and manage the County's funds with integrity, transparency, and accountability.

I graduated magna cum laude from the University of Southern California with a degree in Business Administration and an emphasis in International Finance. This education, combined with decades of financial leadership, satisfies the requirements of San Diego County Administrative Code Section 840 and equips me with the analytical skills, financial acumen, and disciplined judgment required for the role of Treasurer-Tax Collector.

Since December 2024, I have had the privilege of serving as the elected Treasurer for the City of Carlsbad. In this capacity, I serve in a fiduciary role, making all investment decisions for the City's portfolio and guided by the statutory objectives of safety, liquidity, and yield, in that order. Upon assuming office, I identified provisions in the City's investment policy that were inconsistent with Government Code §53601 and led an update to ensure full compliance. I also established an Investment Review Board to provide independent oversight and increase transparency. In furthering transparency, I identified and disclosed impermissible investments in Canadian banks that had been purchased prior to my tenure and am actively working to close those positions without a loss to the City. In recognition of my commitment to professional development, I earned the designation of California Certified Municipal Treasurer (CCMT) through the California Municipal Treasurers Association (CMTA), reflecting my expertise in cash management, investing, and public fund stewardship.

Prior to my election in Carlsbad, I founded and led an eCommerce company serving consumer, business, and government clients. Over a twenty-year period, I managed all aspects of operations—including finance, sales, logistics, and customer service—while maintaining direct responsibility for financial management and reporting, including budgeting, cash flow, and vendor relationships. I successfully exited the business through a strategic sale in 2022. In addition, as Co-Founder and Chief Financial Officer of a private healthcare company in Poway, I directed financial operations for a licensed facility, overseeing budgeting, compliance, and capital allocation in a regulated environment. Earlier in my career, I held corporate finance roles with several companies, including The Walt Disney Company, where I gained valuable experience in financial analysis, forecasting, and treasury operations.

Throughout my career, I have demonstrated consistent strengths in fiscal discipline, policy compliance, and financial transparency. I believe these are essential qualities for the next Treasurer-Tax Collector. San Diego County residents deserve a Treasurer who will protect public funds, ensure legal compliance, and communicate clearly and openly with both the Board of Supervisors and the public.

I am committed to bringing these values and experiences to the Treasurer-Tax Collector's Office and would be honored to serve the people of San Diego County in this role.



3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

I am seeking appointment to the office of County Treasurer-Tax Collector because I want to continue my public service on a broader scale and put my experience to work for the benefit of San Diego County residents. Having worked in both the private sector and now as an elected city treasurer, I understand the importance of managing public funds with transparency, accountability, and efficiency.

In Carlsbad, I have been directly responsible for all investment decisions in a nearly \$1 billion portfolio and have worked to ensure compliance with state law, strengthen oversight, and increase public transparency. This has deepened my belief that residents deserve clear communication about how their tax dollars are collected, safeguarded, and invested.

I am impressed by the accomplishments of the Treasurer-Tax Collector's Office, including its consistently high tax collection rate and AAA investment pool rating for 25 consecutive years. My intention is not to politicize this position or suggest that something needs fixing, but to build on this legacy of excellence. Drawing on my background in business and public service, I would focus on using technology and process efficiency to continue providing unparalleled service while carefully managing taxpayer resources.

The Treasurer-Tax Collector's office is a vital institution, and this unexpected mid-term vacancy presents an opportunity to ensure continuity and stability in the County's financial operations. I am motivated by the chance to use my experience to protect taxpayer funds, strengthen trust in county government, and ensure the County's financial systems continue to operate with the highest standards of professionalism and integrity. My goal is to bring the same diligence, transparency, and public focus I have demonstrated in Carlsbad to serve the broader community at the County level.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, Christian Pencoy, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 18 day of September, 2025, at _____, California.

Signature: _____

E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.

University of Southern California

The Trustees of the University by virtue of the authority vested
in them and on the recommendation of the faculty of

The School of Business

have conferred the degree of

Bachelor of Science

Business Administration

on

Christian M. Peacock

born at Los Angeles, California, on the seventh day of May, in the year
one thousand nine hundred and ninety-three

Stuart C. Sample
President of the University

Kenneth A. Shumway
Dean of the School of Business



Major Case Teacher

John R. Cantley
Dean

CHRISTIAN PEACOX

Objective

To serve as San Diego County Treasurer-Tax Collector, applying my municipal treasury leadership, financial management expertise, and commitment to transparency to safeguard public funds and strengthen the County's financial stewardship.

Professional Experience

Treasurer – City of Carlsbad, CA

Elected, Dec 2024 – Present

- Serve as the elected Treasurer overseeing the City's ~\$1 billion investment portfolio.
- Updated investment policy to ensure compliance with California Government Code §53601, closing gaps that previously allowed impermissible investments.
- Established an Investment Review Board to strengthen oversight and increase transparency.
- Earned the California Certified Municipal Treasurer (CCMT) designation through CMTA.
- Increased transparency by identifying and reporting impermissible investments in Canadian banks made prior to my tenure; currently working to close out the positions to ensure no loss to the City.
- Provided input and oversight in the City's Banking and Merchant Services RFP process, including reviewing drafts, assessing proposals, and participating in vendor interviews to ensure alignment with the City's financial priorities.

President & Founder – Sundaes Novelty, Inc.

May 2002 – Nov 2022 | Northern California & Carlsbad, CA

- Founded and led an eCommerce company with multiple consumer-facing and B2B websites serving household, business, and government customers.
- Managed all aspects of operations—including sales, logistics, and customer service
- Managed all financial operations, including budgeting, cash flow, credit, vendor payments, and capital allocation.
- Negotiated B2G contracts, ensuring compliance with procurement and financial standards.
- Oversaw corporate governance, tax compliance, and reporting requirements over 20 years of operations.
- Scaled operations across multiple markets, building sustainable revenue streams and customer relationships.
- Successfully exited the business in 2022 through a strategic sale, demonstrating long-term financial stewardship and sustainable business growth.

Chief Financial Officer & Co-Founder – Restore Detox Centers, LLC

Jan 2018 – Dec 2020 | Poway, CA

- Co-founded and served as CFO for a private inpatient drug and alcohol treatment facility.
- Directed all financial operations, including budgeting, accounting, payroll, and vendor management.
- Managed compliance with state licensing and healthcare financial regulations.
- Oversaw financing and capital allocation during startup and growth phases.

Earlier Career (1993 – 2005)

- Senior Financial Analyst – Keynote Systems (2004–2005)
- Senior Financial Analyst – Clarify (1996–2001)
- Sales Forecast Analyst – The Walt Disney Company (1995–1996)
- Financial Analyst – Clothestime (1993–1995)

Gained broad corporate finance experience across forecasting, budgeting, and strategic planning in both Fortune 500 and growth-stage companies. Developed expertise in financial analysis, cash management, and revenue forecasting that laid the foundation for later leadership in public and private financial stewardship.

Education

University of Southern California (USC) – Los Angeles, CA
B.S. in Business Administration, Emphasis in International Finance
Graduated Magna Cum Laude

Certifications

California Certified Municipal Treasurer (CCMT) – California Municipal Treasurers Association

Professional Affiliations

California Municipal Treasurers Association (CMTA)

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Peacock Christian

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

San Diego County Treasurer-Tax Collector's Office

Division, Board, Department, District, if applicable

Your Position

Treasurer-Tax Collector

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County

☒ County of San Diego

☐ City of

☐ Other

3. Type of Statement (Check at least one box)

☐ Annual: The period covered is January 1, 2024, through
December 31, 2024.

-or-

The period covered is / / through
December 31, 2024.

☐ Leaving Office: Date Left / /
(Check one circle below.)

☐ The period covered is January 1, 2024, through the date of
leaving office.

-or-

☐ The period covered is / / through
the date of leaving office.

☐ Assuming Office: Date assumed / /

☒ Candidate: Date of Election 9/30/2025 and office sought, if different than Part 1:

4. Schedule Summary (required)

► Total number of pages including this cover page: 3

Schedules attached

☒ Schedule A-1 - Investments - schedule attached

☐ Schedule C - Income, Loans, & Business Positions - schedule attached

☒ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☐ Schedule B - Real Property - schedule attached

☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- ☐ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER

EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 9/17/2025
(month, day, year)

Signature [Redacted] Filing official.)

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**
(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

▶ NAME OF BUSINESS ENTITY

Morgan Stanley

GENERAL DESCRIPTION OF THIS BUSINESS

Financial Services

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /24 / /24
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /24 / /24
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /24 / /24
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

NVIDIA CORPORATION

GENERAL DESCRIPTION OF THIS BUSINESS

Technology

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

9/26/24 / /24
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /24 / /24
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /24 / /24
ACQUIRED DISPOSED

Comments: _____

SCHEDULE A-2
Investments, Income, and Assets
of Business Entities/Trusts
(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
Name _____

► 1. BUSINESS ENTITY OR TRUST

Peacox Charitable Remainder Trust

Name

Carlsbad, CA 92009

Address (Business Address Acceptable)

Check one

☒ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$0 - \$1,999
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INVESTMENT

☐ Partnership ☐ Sole Proprietorship ☐ Other _____

YOUR BUSINESS POSITION _____

► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- ☐ \$0 - \$499 ☐ \$10,001 - \$100,000
☐ \$500 - \$1,000 ☒ OVER \$100,000
☐ \$1,001 - \$10,000

► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

☒ None or ☐ Names listed below

► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold _____ Yrs. remaining ☐ Other _____

☐ Check box if additional schedules reporting investments or real property are attached

► 1. BUSINESS ENTITY OR TRUST

Name

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$0 - \$1,999
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INVESTMENT

☐ Partnership ☐ Sole Proprietorship ☐ Other _____

YOUR BUSINESS POSITION _____

► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- ☐ \$0 - \$499 ☐ \$10,001 - \$100,000
☐ \$500 - \$1,000 ☐ OVER \$100,000
☐ \$1,001 - \$10,000

► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

☐ None or ☐ Names listed below

► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold _____ Yrs. remaining ☐ Other _____

☐ Check box if additional schedules reporting investments or real property are attached

Comments: _____

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Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

Rafe Edward

First Name

Trickey, Jr.

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD ASSESSMENT APPEALS
2025 SEP 17 AM 10:41



Application Timeline

- | | |
|---------------------------|---|
| September 22, 2025 | Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon. |
| September 30, 2025 | Hearing on all applicants. Please plan to attend this meeting. |

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ **Yes, I understand**

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ **Yes, I understand**

A. Tell us About Yourself

First Name: Rafe Edward

Last Name: Trickey, Jr.

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Phone 2:

E-mail:

Type:

Cell

Type:

Home Landline

Have you lived at your current address for more than five years?

If no, please list your previous addresses on page 4.

☒ Yes

☐ No

If you have not lived at your current address for more than five years, please list your addresses for the past five (5) years:

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: _____ Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840): ☒ Yes ☐ No
Select all that apply and attach appropriate verification.
 - ☒ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

RET

5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

I possess over 30 years of experience managing institutional financial services, developing investment policies, managing investment portfolios, and developing and managing multi-million-dollar budgets.

I've served as a City Treasurer in San Diego County, overseeing the day-to-day management of a nearly \$400 million investment fund, ensuring the fund was protected, ample liquidity to meet city budgeted expenditures was maintained, and optimal investment income was generated within the parameters of prudent risk management--during my leadership tenure, investment fund return increased four-fold. Working with the City Manager, received City Council approval for, created and oversaw a multi-million-dollar IRS Section 115 trust to address the city's growing pension liability. Working with the San Diego County Treasurer-Tax Collector, received approvals for the city to invest in the San Diego County Investment Pool (SDCIP), which increased the city's investment fund return rate. While coordinating and serving as the presiding officer of the city's Citizen Investment Oversight Committee (CIOC), expanded the CIOC and diversified its membership to better reflect the city's citizenry.

I hold an earned doctorate from UC San Diego, an earned Master of Science degree from the University of Southern California, an earned Master of International Affairs degree from Columbia University in the City of New York, an earned Bachelor of Arts degree from UC Santa Barbara, and an earned Certificate in Fund Raising with a Specialization in Institutional Development from UCLA.

I served as an Economist within the International Financial Services Division of the Federal Reserve Bank of New York's International Finance Department.

I successfully completed 18 semester units of graduate-level finance, accounting, and auditing coursework at Columbia University in the City of New York and the University of Southern California.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

During three decades of leadership, my greatest professional and personal joy has been to provide excellent public service. I was a successful and impactful appointed City Treasurer, serving a coastal city in North San Diego County. The primary reason I wish to serve as San Diego County's Treasurer-Tax Collector is that because of my successful experience as a City Treasurer in San Diego County, I know that as Treasurer Tax-Collector I will provide excellent public service and make a positive impact for all of San Diego County's stakeholders. Making a positive and enduring impact is extremely important to me.

I know this position well and I would bring to this important financial services leadership position great passion for and personal experience in opening doors to all who are motivated to enrich their lives, the highest level of commitment and an unwavering dedication to the importance of inclusive and consensus-building leadership and participatory governance. I'm committed to collegial governance, teamwork, strategic planning, long-term financial sustainability, community member success, access, equity, institutional development and advancement, innovation and creative leadership.

I'm very excited about serving as San Diego County's Treasurer-Tax Collector. I'm a transformational leader who has worked extensively in non-profit leadership, government and higher education. I've developed and successfully managed complex, multi-million-dollar annual and longer-term budgets and investment portfolios, securing financial stability and sustainability along the way. I've worked hand-in-hand with legislators, other appointed and elected government officials (including elected Boards of Supervisors and City Council members), tribal leaders, and other elected and appointed boards of directors, boards of trustees and boards of regents. I have successfully secured and maintained millions of dollars of new sources of revenue for the institutions, non-profit organizations and public entities I've served and led.

I'm communicative, collegial, always available for community meetings, punctual, highly motivated, hands-on and productive. I'm experienced in public relations and civic engagement and I'm comfortable working in varied environments. I possess strong project management skills. I'm a patient problem solver, who is open to the ideas and suggestions of others. I'm flexible but firm in problem resolution. I'm a decision maker and a team player, who is supportive of staff, and I'm service-oriented.

I've experienced and had the good fortune to overcome deficits and adversity. I'm completely committed to assuring that the service community stakeholders with whom I work are successful. To some extent, I was them. To some extent, I know them. To every extent, I see them.

Thank you for your consideration.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, Rafe Edward Trickey, Jr., as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

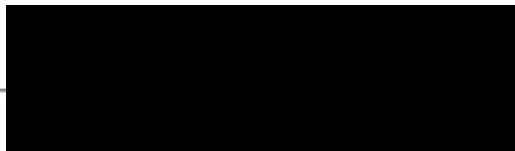
I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 17th day of September, 2025, at Oceanside, California.

Signature: _____



E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.



POSTSECONDARY EDUCATIONAL CREDENTIALS EARNED

UNIVERSITY OF CALIFORNIA, SAN DIEGO

Doctor of Education

Major in Institutional Leadership

UNIVERSITY OF SOUTHERN CALIFORNIA

Master of Science

Major in Policy, Planning, and Administration

COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK

Master of International Affairs

Specialization in International Finance and Banking

UNIVERSITY OF CALIFORNIA, SANTA BARBARA

Bachelor of Arts

Double Major in Political Science and History, Graduated with High Honors

UNIVERSITY OF CALIFORNIA, LOS ANGELES

Certificate in Fund Raising

Specialization in the Institutional Development Process

PRIMARY GOVERNANCE AND FINANCIAL SERVICES EXPERIENCE

Chief Executive Officer, North San Diego County Promise (07/2018 – Present)

Superintendent/President and Chief Executive Officer, West Kern Community College District/Taft College (06/2024 – 06/2025)

City Treasurer, City of Oceanside (01/2017 – 12/2018)

President, Comanche Nation College (08/2014 – 08/2016)

President and Chief Executive Officer, Sisseton Wahpeton College (09/2012 – 09/2013)

Vice President of Planning and Institutional Development and Vice President of Student Services, College of the Marshall Islands (06/2011 – 09/2012)

Executive Director of Development and External Relations, Citrus Community College District (10/2009 – 08/2010)

President and Chief Executive Officer, California Highway Patrol 11-99 Foundation (07/2003 – 07/2009)

Economist, International Financial Markets Division, International Finance Department, Federal Reserve Bank of New York (06/1988 – 08/1989)

**STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT**

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST)	(FIRST)	(MIDDLE)
Trickey, Jr.	Rafe	Edward

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

County of San Diego

Division, Board, Department, District, if applicable

Treasurer-Tax Collector

Your Position

Treasurer-Tax Collector

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County _____

☒ County of San Diego

☐ City of _____

☐ Other _____

3. Type of Statement (Check at least one box)

☒ **Annual:** The period covered is January 1, 2024, through December 31, 2024.

-or-

The period covered is ____/____/____, through December 31, 2024.

☐ **Leaving Office:** Date Left ____/____/____
(Check one circle below.)

☐ The period covered is January 1, 2024, through the date of leaving office.

-or-

☐ The period covered is ____/____/____, through the date of leaving office.

☐ **Assuming Office:** Date assumed ____/____/____

☐ **Candidate:** Date of Election ____ and office sought, if different than Part 1: _____

4. Schedule Summary (required)

► Total number of pages including this cover page: _____

Schedules attached

☐ **Schedule A-1 - Investments** – schedule attached

☐ **Schedule A-2 - Investments** – schedule attached

☒ **Schedule B - Real Property** – schedule attached

☒ **Schedule C - Income, Loans, & Business Positions** – schedule attached

☐ **Schedule D - Income – Gifts** – schedule attached

☐ **Schedule E - Income – Gifts – Travel Payments** – schedule attached

-or- ☐ **None** - No reportable interests on any schedule

5. Verification

MAILING ADDRESS	STREET	CITY	STATE	ZIP CODE
(Business or Agency Address Recommended - Public Document)				

DAYTIME TELEPHONE NUMBER

EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 09/16/2025

(month, day, year)

Signature

SCHEDULE B
Interests in Real Property
(Including Rental Income)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
Name
Rafe Edward Trickey, Jr.

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

3378 Tournament Drive

CITY

Oceanside

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☒ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☒ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ Yrs. remaining ☐ _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

3592 De Luz Heights Road

CITY

Fallbrook

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☒ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☒ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ Yrs. remaining ☐ _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

☐ Guarantor, if applicable

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

☐ Guarantor, if applicable

Comments:

SCHEDULE C
Income, Loans, & Business
Positions
(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name Rafe Edward Trickey, Jr.

▶ 1. INCOME RECEIVED	▶ 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME West Kern Community College District	NAME OF SOURCE OF INCOME City of Oceanside
ADDRESS (Business Address Acceptable) 29 Cougar Court, Taft, CA 93268	ADDRESS (Business Address Acceptable) 300 North Coast Highway, Oceanside, CA 92054
BUSINESS ACTIVITY, IF ANY, OF SOURCE Public Community College District	BUSINESS ACTIVITY, IF ANY, OF SOURCE Municipality
YOUR BUSINESS POSITION Superintendent/President and CEO	YOUR BUSINESS POSITION Chief Assistant City Attorney (Spouse)
GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> OVER \$100,000	GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input checked="" type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)	CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input checked="" type="checkbox"/> Salary <input checked="" type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*	INTEREST RATE	TERM (Months/Years)
_____	_____% <input type="checkbox"/> None	_____
ADDRESS (Business Address Acceptable)	SECURITY FOR LOAN	
_____	<input type="checkbox"/> None <input type="checkbox"/> Personal residence	
BUSINESS ACTIVITY, IF ANY, OF LENDER	<input type="checkbox"/> Real Property _____	Street address
_____		City
HIGHEST BALANCE DURING REPORTING PERIOD	<input type="checkbox"/> Guarantor _____	
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> Other _____	(Describe)
<input type="checkbox"/> \$1,001 - \$10,000		
<input type="checkbox"/> \$10,001 - \$100,000		
<input type="checkbox"/> OVER \$100,000		

Comments: _____

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Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

Detra

First Name

Williams

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD CLERK OF THE BOARD
2025 SEP 15 PM 1:58



Application Timeline

- | | |
|---------------------------|---|
| September 22, 2025 | Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon. |
| September 30, 2025 | Hearing on all applicants. Please plan to attend this meeting. |

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ **Yes, I understand**

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ **Yes, I understand**

A. Tell us About Yourself

First Name: Detra

Last Name: Williams

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

same

City:

State:

Zip Code:

Contact Information

Phone 1:

Type:

work

Phone 2:

Type:

cell

E-mail:

Have you lived at your current address for more than five years?

☒ Yes

☐ No

If no, please list your previous addresses on page 4.

**If you have not lived at your current address for more than five years, please list
your addresses for the past five (5) years:**

Date From: N/A Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: N/A Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: N/A Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: N/A Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

Date From: N/A Date To: _____
Street Address: _____
City: _____
State: _____ Zip Code: _____

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840): ☒ Yes ☐ No
Select all that apply and attach appropriate verification.
 - ☒ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

DW

5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

As a proud decades-long employee who has steadily grown in leadership roles during my time at the Treasurer-Tax Collector's office, I enthusiastically throw my hat in the ring to be considered for the Interim Treasurer-Tax Collector role. I have a BS Degree in Business Management and 34 years of service to the County of San Diego, 23 years with the Treasurer-Tax Collector's (TTC) office. I have the experience, expertise, and knowledge that spans from Departmental Personnel Officer to Manager, with the last 13 years as a Tax Collection Manager, serving across all three divisions. The Manager TTC, is a senior level position that reports to the Chief Deputy Tax Collector. The position has financial responsibilities overseeing the billing, collection, application, and refunding of over \$9 billion in property taxes. Additionally, my service on the Deferred Compensation Investment Oversight Committee for 3 years and 10 years as the Treasurer of the County Employees' Charitable Organization further bolsters my skills, knowledge and relevant financial experience. Some of my most impactful accomplishments as a Manager, TTC include:

Financial Division – Oversight of more than 1 million property tax payments processed annually through high-speed imaging machinery. Oversight of issuance of more than 300,000 property tax refunds annually. Responsible for the annual escheatment of unclaimed property tax refunds. Business lead in the development, testing and implementation of the TTC online payment and iPayment Cashiering systems which are the foundation to TTC's ability to maintain a 99% secured property tax collection rate of which 75% are collected electronically. Developed and facilitated "Goal Setting Workshops" to generate workforce enthusiasm, inspire innovation and achieve departmental goals.

Information Division – Oversight of the printing and mailing of over 1 million property tax bills annually as well as the bi-annual peak tax collection periods. Lead over customer service efforts through the call center, in-person, mail correspondence and Taxman emails. Sustained a high customer satisfaction rating and a 99% annual secured tax collection rate, keeping operations steady through the disruption of the COVID-19 pandemic. Assisted taxpayers in understanding their property taxes and applied the Revenue & Taxation code. Spearheaded innovative and award-winning solutions including an intuitive re-design of the Tax Bill Guides; the "Trending Now" section of the sdttc.com website; the "Supplemental Tax Bills" and "How to Pay by E-check" videos which are available online; the online Prior-Year Property Tax Information; and the "COVID-19 Request for Property Tax Penalty Relief program.

Special Functions Division – Oversight of collection of Unsecured Tax, Cannabis Tax, Transient Occupancy Tax (TOT), Tax Enforcement and the Annual Public Tax Sale Auction. Launched the Cannabis Tax Administration Program by developing the ordinance in collaboration with various County departments, writing policies and procedures, and facilitating the Cannabis Tax Administration Orientation for business owners. Business lead in the implementation of the Short-Term Rental Monitoring & Compliance system resulting in a \$3 million increase in TOT revenue in the first year.

As a longtime TTC employee and well-liked, effective leader, my history of accomplishments and record of facilitating positive team

500 word max exceeded. Text redacted.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

I appreciate the opportunity to be considered for the role of Interim Treasurer-Tax Collector. As Interim TTC, I have a vision to carry forward a highly functioning workforce that will facilitate continued engagement and growth, even in the absence of an elected leader and push forward for continued innovation and success. I am not interested in running for the elected position, allowing me to focus solely on the immediate needs of TTC, however, I am a proven leader who has a passion for the department.

The Treasurer-Tax Collector's office plays an important role in the fiscal stability of the County. To successfully perform in the position, an individual must acquire knowledge of department operations, develop relationships with stakeholders and earn the support of the workforce. It is important that there be consistency in leadership to guide the department through this short transition period when uninterrupted high-performance is necessary. My consistent leadership in the department will foster a positive organizational culture, allow for predictability that reduces uncertainty, and empower the team to stay focused on the mission of the department.

My vision is to focus on the top priorities of the department:

- 1) Maintain stability in the County Treasury Pool
- 2) Ensure that the 99% tax collection rate is sustained
- 3) Retain the talented staff that has driven the success of the department

My strategy is to leverage the trusting and supportive relationships with talented professionals in the County to lead the department through this transition period that is happening during an uncertain economic climate. We will mitigate the risks to the Treasury Pool as a team that has experience with challenging times. We are poised to address the needs of the taxpayers as we foresee the possibility of inflation, business loss and rising unemployment which may impact the taxpayers' ability to pay property taxes. We will retain and build a strong workforce that is well-versed and understands how their roles are interwoven.

The Integrated Property Tax System (IPTS) is an important County investment that will be implemented very soon. TTC is poised to embrace the new system, challenge it, make it better and find ways to leverage the new technology to facilitate informed decision-making and create tools to enhance the taxpayer experience. I will continue to encourage and support the staff through this.

A strong, proven leader is the key to ensuring that this vision is set in motion. I am passionate about fostering a culture that embodies the guiding principles of being kind, curious, bold and doing the right thing. I have developed relationships with staff through a leadership style that is approachable, encouraging and fair. It is important to maintain a dynamic team of diverse, talented individuals who are trustworthy and enthusiastic. We each play valuable roles that are the key to the continuous growth, innovation and success of the County. With the support of a resilient workforce, lead by a strong leader, the department will continue to produce the high-quality work that TTC is known for.

My experience in Human Resources, Budget Management and Business Leadership has positioned me as a visionary asset to the department. My education, training and diverse experience has prepared me for this role. As demonstrated by my track-record of transitioning and adapting to programs of various purposes and positioning them for the future, my ability to lead, innovate and enhance a program is unmistakable. I strive to continue learning industry innovations, and apply relevant, forward-looking solutions to enhance our already high-performing department. By appointing me, a knowledgeable and proven leader, to the position of Interim Treasurer-Tax Collector, I can assure you that TTC will continue to safeguard the County Treasury Pool, maintain a 99% secured property tax collection rate and be prepared to seamlessly propel the department into the future when the newly elected official assumes the position.

Thank you again for the opportunity.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, **Detra Williams**

, as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

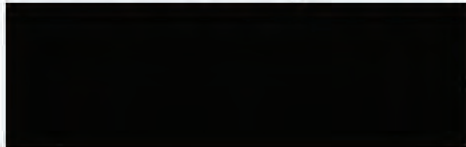
I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

I certify under penalty of perjury that the foregoing is true and correct.

Executed on this 15th day of September, 2025, at San Diego, California.

Signature:



E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.



DETRA WILLIAMS



Professional Summary

Seasoned Manager, Treasurer-Tax Collector with over two decades of service in the County of San Diego Treasurer-Tax Collector's Office. Recognized for managing tax programs spanning secured and unsecured property taxes, cannabis tax, transient occupancy tax, and specialty collections. Proven history of managing \$9B+ in annual tax revenue collection across over 1M parcels, with oversight of all core tax functions including payment processing, refunds, auctions, and enforcement. Known for sustaining a 99% collection rate even during pandemic disruption. Demonstrated ability to interpret and apply the Revenue & Taxation Code in litigation, as well as secure full County wins in taxpayer lawsuits through expert testimony. Direct contributor to the design and launch of the Cannabis Tax Administration Program as well as the Short-Term Rental Monitoring & Compliance System, which increased Transient Occupancy Tax revenue by \$3M in its first year and more than doubled compliance.

Core Competencies

- Property Tax Collection
- Revenue & Taxation Code
- Government Code
- Budget Management
- Escheatment Processing
- Cannabis Tax Administration
- Online Payment Systems
- Cash Handling
- System Testing and Implementation
- Contract Administration
- Legal Case Documentation
- Staff Training Programs
- Strategic Planning
- Procedure Development
- Financial Forecasting
- Public and Board Inquiries
- Taxpayer Disputes Handling
- Oracle Financials
- PeopleSoft

Professional Experience

County of San Diego

Manager, Treasurer-Tax Collector
05/2012 - Current

- Sustained consistent 99% property tax collection on \$8B annually by leading multi-division operations across secured, unsecured, cannabis, and TOT revenue streams for over 1M parcels, ensuring revenue continuity and taxpayer trust.
- Improved team performance by leading and mentoring 30 tax personnel per division and first-time managers, resulting in improved autonomy, cross-training, and process execution. Launched annual 'Goal Setting Workshop,' which promoted a mindset of innovation and drove morale improvements, personal growth, and ongoing process refinements.
- Improved outreach, service quality, and taxpayer responsiveness by overseeing call center, in-person, email, and correspondence channels, and equipping frontline staff with accessible reference tools.
- Increased taxpayer awareness by spearheading award-winning 'Trending Now' digital hub, and educational tax bill videos, to improve service transparency and self-service adoption.
- Secured policy compliance, legal defensibility, and taxpayer issue resolution by partnering with County Counsel on litigation strategy, collaborating with Board of Supervisors' staff on constituent tax disputes, and driving approval for tax sale auctions and ordinance changes.
- Delivered on time, compliant tech and procurement solutions in coordination with IT teams and vendors; implemented system upgrades and led RFP and contract administration as Contracting Officer

Representative, to improve system performance and vendor accountability.

- Prevented widespread taxpayer distress and enabled penalty relief during the COVID-19 crisis by developing standalone policies, procedures, and forms under discretionary legal authority, as well as coordinating with leadership and communications teams to distinguish cases, guide taxpayers, and support County responsiveness during the emergency.
- Increased online payments from 25% to 55% and reduced taxpayer call volume by partnering with IT to implement the iPayment cashiering system, integrate Heartland back-end processing for credit and e-check transactions, and upgrade Sonant online and phone interfaces, resulting in faster payment cycles and improved customer experience.
- Secured full legal victories in taxpayer litigation and upheld County interests by representing TTC in small claims court and depositions, serving as expert witness, and producing documented evidence in property ownership, non-payment, and penalty disputes.
- Improved coordination between divisions by leading weekly, monthly, and project-based staff meetings focused on timely tax collection, accurate refunds, and successful public auctions.
- Reduced taxpayer calls and increased customer satisfaction by providing solutions such as Prior-Year Property Tax portal, and award-winning website features such as 'Trending Now,' 'How to Pay by E-check,' and 'Supplemental Tax Bills' videos.
- Improved taxpayer understanding and reduced service inquiries by redesigning Tax Bill Guide with color-coded sections, simplified language, and FAQs, now included with over 1M property tax bills annually as a core education and compliance tool.
- Supported revenue recovery by leading Specialty Collections, Tax Enforcement operations, and annual Public Auction Tax Sale, while ensuring lawful disposition of delinquent properties.
- Surpassed cannabis tax revenue projections by 50% by co-developing and deploying the County's first Cannabis Tax Administration Program, integrating ordinance development, taxpayer onboarding, and digital filing tools; collaborated with multiple departments on authoring policy, configuring Oracle Financials, and leading stakeholder onboarding to enforce compliance and streamline quarterly reporting.
- Increased TOT revenue by \$3M and 2x'd compliant operators by developing and implementing Short-Term Rental Monitoring & Compliance System, securing funding, defining system specs, coordinating vendor integration, and automating data capture from platforms like Airbnb and VRBO to register and enforce tax compliance for 900+ STRs.
- Managed tax refund issuance and unclaimed funds escheatment across 1M + parcels by overseeing Financial Division operations, including collection of secured and unsecured property taxes and supervising 33 staff across refund and processing units.
- Streamlined staff onboarding and operational consistency by developing written procedures for high-speed ImageRPS remittance processing equipment, adopted as a core training reference.
- Ensured timely refund processing and accurate financial records by reviewing expenditures, critical supply orders, and resolving misaligned refund data within the property tax system.

County of San Diego
**Assistant Manager, Treasurer-
Tax Collector**
12/2010 - 05/2012

- Supported executive decision-making and strategic planning by advising TTC leadership on operational challenges, contributing to policy improvements, and conducting administrative studies to identify root causes and process improvement pathways.

County of San Diego

Administrative Services Manager

I & II, Treasurer-Tax Collector

10/2004 - 12/2010

- Maintained a positive fund balance during recession-era budgets by managing \$20M departmental budget, preparing five-year forecasts, and presenting monthly budget reports with visual analysis to TTC Executive Committee to support informed fiscal decisions.
- Increased IT accountability and cost efficiency by ensuring IT Contract Manager is included in budget planning and executive discussions, enabling successful implementation of multiple high-impact systems, including Web Integrated Tax, Wire, and online payment platforms.
- Sustained 99% property tax collection rate over two decades despite 200K+ parcel growth and flat staffing levels by aligning IT investments with department-wide tax processing and service delivery improvements.
- Supported compliance with the County's General Management System by coordinating department-wide input into the annual Operational Plan, tracking goal alignment, and reporting fiscal year-end outcomes.
- Led, trained, and mentored 4 team members, including HR Officer, Payroll Clerk, Administrative Analyst, and Student Worker in Oracle Financials, PeopleSoft HR, and County-wide policies.
- Managed departmental HR, fiscal, and purchasing functions by directing budget reviews and contract workflows and assisting in County policy interpretation to ensure continuity across business operations.

County of San Diego

Departmental Personnel Officer

II, Treasurer-Tax Collector

04/2003 - 10/2004

- Improved staffing efficiency and workforce planning by forecasting personnel needs, developing staffing plans, managing department-wide recruitment, onboarding, and internal mobility efforts.
- Strengthened labor relations by conducting discipline investigations, coordinating labor/management meetings, and collaborating with employee representatives on compensation and working conditions.
- Enhanced employee capability by designing and delivering training programs, overseeing department-wide development initiatives, and guiding staff through evolving employment regulations.
- Supported equitable workforce classification and budgeting accuracy by conducting research for position reclassifications and performing salary projections to inform leadership planning and funding alignment.

County of San Diego

Personnel Officer / Legal Support

Supervisor / Supervising Clerk

08/1998 - 04/2003

Education, Certifications, and Professional Development

University of Phoenix, **Bachelor of Science** in Business Management, Summa Cum Laude

Cash Handling Certification

Dynamic Management Seminars

Finance Academy

Employment Law Courses

Discipline Case Advocacy Institute

IPMA-HR Certification

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Williams Detra Celese

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

County of San Diego

Division, Board, Department, District, if applicable

Treasurer-Tax Collector

Your Position

Manager

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County

☒ County of San Diego

☐ City of

☐ Other

3. Type of Statement (Check at least one box)

☐ Annual: The period covered is January 1, 2024, through
December 31, 2024.

☐ Leaving Office: Date Left / /
(Check one circle below.)

-or-

The period covered is / / through
December 31, 2024.

☐ The period covered is January 1, 2024, through the date of
leaving office.

-or-

The period covered is 01 / 01 / 2025 through
the date of leaving office.

☒ Assuming Office: Date assumed 11 / 04 / 2025

☒ Candidate: Date of Election 11/4/2025 and office sought, if different than Part 1: Interim Treasurer-Tax Collector

4. Schedule Summary (required)

► Total number of pages including this cover page:

Schedules attached

☐ Schedule A-1 - Investments - schedule attached

☐ Schedule C - Income, Loans, & Business Positions - schedule attached

☒ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☒ Schedule B - Real Property - schedule attached

☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- ☐ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET
(Business or Agency Address Recommended - Public Document)

1600 Pacific Highway Room 162

CITY

San Diego

STATE

CA

ZIP CODE

92101

DAYTIME TELEPHONE NUMBER

(619) 531-4763

EMAIL ADDRESS

detra.williams@sdcounty.ca.gov

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed

9/15/2025
(month, day, year)

Signature

(Filing Official)

SCHEDULE A-2
Investments, Income, and Assets
of Business Entities/Trusts
(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
Williams, Detra

► 1. BUSINESS ENTITY OR TRUST

Williams Family Construction Co.

Name

404 Vista Santa Rita, San Diego, CA 92154

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$0 - \$1,999
☐ \$2,000 - \$10,000
☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INVESTMENT

☐ Partnership ☒ Sole Proprietorship ☐ Other

YOUR BUSINESS POSITION spouse of proprietor

► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- ☐ \$0 - \$499 ☒ \$10,001 - \$100,000
☐ \$500 - \$1,000 ☐ OVER \$100,000
☐ \$1,001 - \$10,000

► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

☒ None or ☐ Names listed below

► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold Yrs. remaining ☐ Other

☐ Check box if additional schedules reporting investments or real property are attached

► 1. BUSINESS ENTITY OR TRUST

Name

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$0 - \$1,999
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INVESTMENT

☐ Partnership ☐ Sole Proprietorship ☐ Other

YOUR BUSINESS POSITION

► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- ☐ \$0 - \$499 ☐ \$10,001 - \$100,000
☐ \$500 - \$1,000 ☐ OVER \$100,000
☐ \$1,001 - \$10,000

► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

☐ None or ☐ Names listed below

► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☒ REAL PROPERTY

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold Yrs. remaining ☐ Other

☐ Check box if additional schedules reporting investments or real property are attached

Comments:

SCHEDULE B
Interests in Real Property
(Including Rental Income)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
Name
Williams, Detra

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS
549-292-06-00

CITY
San Diego, CA

FAIR MARKET VALUE
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☒ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:
_____/_____/24 ACQUIRED ____/_____/24 DISPOSED

NATURE OF INTEREST
☒ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ Yrs. remaining ☐ _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED
☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☒ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.
☐ None
Lelani Simms

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

FAIR MARKET VALUE
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:
_____/_____/24 ACQUIRED ____/_____/24 DISPOSED

NATURE OF INTEREST
☐ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ Yrs. remaining ☐ _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED
☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.
☐ None

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE _____% ☐ None TERM (Months/Years) _____

HIGHEST BALANCE DURING REPORTING PERIOD
☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000
☐ Guarantor, if applicable

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE _____% ☐ None TERM (Months/Years) _____

HIGHEST BALANCE DURING REPORTING PERIOD
☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000
☐ Guarantor, if applicable

Comments: _____