

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

The following applicants were selected as finalists by the Board of Supervisors on September 30, 2025 (13) 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	David	Baker	3
2	Lawrence (Larry)	Cohen	17
3	Christian	Peacox	35
4	Detra	Williams	51

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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 PM12:43



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.

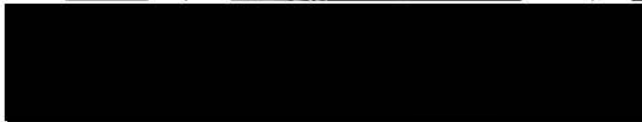
I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

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.

Lawrence (Larry)

First Name

Cohen

Last Name

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CLERK OF THE BOARD
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☒ **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: _____

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Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

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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.
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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
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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 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

- ☐ \$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 ☐ 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 ☐ \$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

Parcel # 261-061-37-00

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

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

- ☐ \$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 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 ☐ No Income - Business Position Only ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000 ☐ \$10,001 - \$100,000 ☒ OVER \$100,000	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)	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*	INTEREST RATE	TERM (Months/Years)
_____	_____ % ☐ None	_____
ADDRESS (Business Address Acceptable)		

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

Comments: Additional rental income on Attachment

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

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
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)
The Sultanate of Oman

ADDRESS (Business Address Acceptable)
2535 Belmont Road NW

CITY AND STATE
Washington, DC

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

DATE(S): 05/25/24 - 06/02/24 AMT: \$ unknown
(If gift)

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

☐ Made a Speech/Participated in a Panel

☒ Other - Provide Description Congressional staff travel under Section 108A of the Mutual Educational and Cultural Exchange Act of 1961

▶ If Gift, Provide Travel Destination Muscat, Oman

▶ 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

☐ Made a Speech/Participated in a Panel

☐ 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.

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.

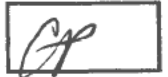
1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840): ☒ Yes ☐ No
Select 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.
- ☐ Assuming Office: Date assumed / /
- ☐ 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.
- ☒ 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
 (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 _____

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

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

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

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

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

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☐ Over \$1,000,000

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____/____/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.

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.

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

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COSD CLERK OF THE BOARD
2025 SEP 15 PM 1:38



Application Timeline

- | | |
|---------------------------|---|
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Important Things to Know

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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):
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 (IPT) 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.

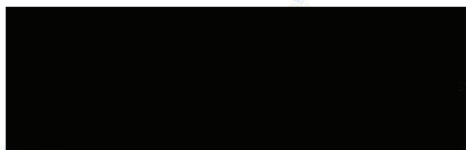
I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

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

- | | | |
|---|---|--|
| <ul style="list-style-type: none">• Property Tax Collection• Revenue & Taxation Code• Government Code• Budget Management• Escheatment Processing• Cannabis Tax Administration• Online Payment Systems | <ul style="list-style-type: none">• Cash Handling• System Testing and Implementation• Contract Administration• Legal Case Documentation• Staff Training Programs• Strategic Planning | <ul style="list-style-type: none">• 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 / 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

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 / 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: _____