



CONTRA COSTA COMMISSION FOR WOMEN

P.O. Box 6695

Concord, CA 94520

E-Mail: womenscommission@gmail.com

DATE: January 19, 2016 TO: Family and Human Services Committee

FROM: Phyllis L. Gordon, Membership Chair, Contra Costa Commission for Women

SUBJECT: Recommended Appointments to the Contra Costa Commission for Women

The purpose of this memorandum is to forward to you the following recommendation from the Contra Costa Commission for Women (CCCW):

- Appoint Bonnie McCreary to At Large Seat 5 on the CCCW
- Appoint Patricia Ramirez to At Large Seat 6 on the CCCW

Background

The Contra Costa Commission for Women was formed to educate the community and advise the Contra Costa County Board of Supervisors and other entities on the issues relating to the changing social and economic conditions of women in the County, with particular emphasis on the economically disadvantaged.

The Committee consists of 25 members and one alternate, including:

- Five district representatives; (one from each supervisorial; districts)
- Twenty at large members; and
- One at large alternate.

The five district representatives are nominated for a three year term by each of the five members of the Board of Supervisors. The twenty at large members and one at large alternate are nominated by the CCCW membership committee and forwarded to the full CCCW. All nominated appointments to the CCCW are reviewed by the Family and Human Services Committee (IOC) and referred to the Board of Supervisors for approval. CCCW terms are for three years and they are staggered across the membership. A current CCCW roster, as of May 22, 2013, is attached for your information (Attachment A).

Current Status of Appointments

The CCCW have been actively recruiting applicants on an ongoing basis to fill the vacant seats.

The membership committee unanimously approved the above recommendations.

As of January 19, 2016 there are 14 at large vacancies and a District 3 appointee opening . The At Large Alternate seat is also vacant.

If the appointment recommended in this memorandum is ultimately approved, two at large seats will be filled. The vacancies remaining after approval would be 12 at large seats and one alternate. With three others applicants in process (interviews) as of January 1, 2016.

Since May 2004, the CCCW has had extremely limited staff support and no budget provided by the County. However, the CCCW membership committee is continuing its recruiting efforts and plans to fill the remaining vacancies within the next few months.

cc without attachment : CCCW Membership Committee/Gordon, Chair
 Enid Mendoza, CAO



Contra
Costa
County

RECEIVED
 For Office Use Only
 Date Received:
SEP 03 2015
 CLERK BOARD OF SUPERVISORS
 CONTRA COSTA CO.

For Reviewers Use Only:
 Accepted Rejected

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

MAIL OR DELIVER TO:
 Contra Costa County
 CLERK OF THE BOARD
 651 Pine Street, Rm. 106
 Martinez, California 94553-1292
PLEASE TYPE OR PRINT IN INK
 (Each Position Requires a Separate Application)

BOARD, COMMITTEE OR COMMISSION NAME AND SEAT TITLE YOU ARE APPLYING FOR:

Contra Costa County Womens Commission

PRINT EXACT NAME OF BOARD, COMMITTEE, OR COMMISSION

PRINT EXACT SEAT NAME (if applicable)

1. **Name:** McCreary Bonnie Lynnette
 (Last Name) (First Name) (Middle Name)

2. **Address:** 1155C Arnold Drive #260 Martinez CA 94553
 (No.) (Street) (Apt.) (City) (State) (Zip Code)

3. **Phones:** 925-848-8798
 (Home No.) (Work No.) (Cell No.)

4. **Email Address:** bonnielynnettemccreary@gmail.com

5. **EDUCATION:** Check appropriate box if you possess one of the following:

High School Diploma G.E.D. Certificate California High School Proficiency Certificate

Give Highest Grade or Educational Level Achieved Graduate School

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Units Completed		Degree Type	Date Degree Awarded
			Semester	Quarter		
A) Walden University	Leadership Development	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			MS	Jan 2013
B) Holy Names University	Psychology	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			BA	June 1996
C) Chabot College	General Education	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			AA	
D) Other schools / training completed: Workplace Coach Institute	Course Studied Leadership & Talent Management Coaching	Hours Completed 	Certificate Awarded: Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) From <u>3/2013</u> To <u>Present</u></p> <p>Total: Yrs. <u>2</u> Mos. <u>6</u></p> <p>Hrs. per week <u>20</u> . Volunteer <input type="checkbox"/></p>	<p>Title <u>Leadership and Talent Management Consultant</u></p> <p>Employer's Name and Address <u>Self Employed - Parttime contract employment.</u></p>	<p>Duties Performed <u>Provide executive and talent development coaching</u> <u>Administered assessments and provided supporting feedback coaching</u></p>
<p>B) Dates (Month, Day, Year) From <u>6/2008</u> To <u>2/2013</u></p> <p>Total: Yrs. <u>4</u> Mos. <u>8</u></p> <p>Hrs. per week <u>40</u> . Volunteer <input type="checkbox"/></p>	<p>Title <u>Expert Recruitment Consultant</u></p> <p>Employer's Name and Address <u>Kaiser Permanente 200 Muir Road, Martinez, CA</u></p>	<p>Duties Performed <u>Provided talent management consulting, advising, and coaching for leadership and management teams across Kaiser Permanente's Northern California and Hawaii regions; supported Advanced Practice Nursing, Hospital Operations, Allied Health, and Physician Residency.</u></p>
<p>C) Dates (Month, Day, Year) From <u>10/2004</u> To <u>6/2008</u></p> <p>Total: Yrs. <u>3</u> Mos. <u>8</u></p> <p>Hrs. per week <u>40</u> . Volunteer <input type="checkbox"/></p>	<p>Title <u>Business & Recruitment Consultant</u></p> <p>Employer's Name and Address <u>Self Employed/Contractor</u></p>	<p>Duties Performed <u>Engaged in consultancy and talent acquisition assignments that supported small businesses, new venture startups, entrepreneurial enterprises, and full life cycle recruitment business objectives.</u></p>
<p>D) Dates (Month, Day, Year) From <u>1/1999</u> To <u>10/2004</u></p> <p>Total: Yrs. <u>5</u> Mos. <u>9</u></p> <p>Hrs. per week <u>40</u> . Volunteer <input type="checkbox"/></p>	<p>Title <u>Sr. Staffing Consultant</u></p> <p>Employer's Name and Address <u>Kaiser Permanente</u></p>	<p>Duties Performed <u>Directed recruitment team responsible for full-cycle recruitment support for multi-site medical centers in Contra Costa, Napa and Solano Counties</u> <u>Recruitment Advisor to Chief Nursing Officer, Chief Operating Officer, and Hospital Administrators</u></p>

7. How did you learn about this vacancy?

CCC Homepage Walk-In Newspaper Advertisement District Supervisor Other Julianna Hynes

8. Do you have a Familial or Financial Relationship with a member of the Board of Supervisors? (Please see Board Resolution no. 2011/55, attached): No Yes

If Yes, please identify the nature of the relationship:

9. Do you have any financial relationships with the County such as grants, contracts, or other economic relations? No Yes

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publically accessible. I understand and agree that misstatements / omissions of material fact may cause forfeiture of my rights to serve on a Board, Committee, or Commission in Contra Costa County.

Sign Name: Bonnie L. May Date: 9/1/2015

Important Information

1. This application is a public document and is subject to the California Public Records Act (CA Gov. Code §6250-6270).
2. Send the completed paper application to the Office of the Clerk of the Board at: **651 Pine Street, Room 106, Martinez, CA 94553.**
3. A résumé or other relevant information may be submitted with this application.
4. All members are required to take the following training: 1) The Brown Act, 2) The Better Government Ordinance, and 3) Ethics Training.
5. Members of boards, commissions, and committees may be required to: 1) file a Statement of Economic Interest Form also known as a Form 700, and 2) complete the State Ethics Training Course as required by AB 1234.
6. Advisory body meetings may be held in various locations and some locations may not be accessible by public transportation.
7. Meeting dates and times are subject to change and may occur up to two days per month.
8. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.

**THE BOARD OF SUPERVISORS OF CONTRA COSTA COUNTY, CALIFORNIA and for
Special Districts, Agencies and Authorities Governed by the Board Adopted Resolution
no. 2011/55 on 2/08/2011 as follows:**

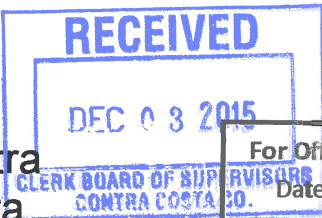
IN THE MATTER OF ADOPTING A POLICY MAKING FAMILY MEMBERS OF THE BOARD OF SUPERVISORS INELIGIBLE FOR APPOINTMENT TO BOARDS, COMMITTEES OR COMMISSIONS FOR WHICH THE BOARD OF SUPERVISORS IS THE APPOINTING AUTHORITY

WHEREAS the Board of Supervisors wishes to avoid the reality or appearance of improper influence or favoritism;
NOW, THEREFORE, BE IT RESOLVED THAT the following policy is hereby adopted:

- I. SCOPE: This policy applies to appointments to any seats on boards, committees or commissions for which the Contra Costa County Board of Supervisors is the appointing authority.
- II. POLICY: A person will not be eligible for appointment if he/she is related to a Board of Supervisors' Member in any of the following relationships:
 1. Mother, father, son, and daughter;
 2. Brother, sister, grandmother, grandfather, grandson, and granddaughter;
 3. Great-grandfather, great-grandmother, aunt, uncle, nephew, niece, great-grandson, and great-granddaughter;
 4. First cousin;
 5. Husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepson, and stepdaughter;
 6. Sister-in-law (brother's spouse or spouse's sister), brother-in-law (sister's spouse or spouse's brother), spouse's grandmother, spouse's grandfather, spouse's granddaughter, and spouse's grandson;
 7. Registered domestic partner, pursuant to California Family Code section 297.
 8. The relatives, as defined in 5 and 6 above, for a registered domestic partner.
 9. Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or business associate.



Contra
Costa
County



For Office Use Only
Date Received:

For Reviewers Use Only:
Accepted Rejected

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Contra Costa County
CLERK OF THE BOARD
651 Pine Street, Rm. 106
Martinez, California 94553-1292
PLEASE TYPE OR PRINT IN INK
(Each Position Requires a Separate Application)

BOARD, COMMITTEE OR COMMISSION NAME AND SEAT TITLE YOU ARE APPLYING FOR:

Contra Costa County Commission for Women Member

PRINT EXACT NAME OF BOARD, COMMITTEE, OR COMMISSION

PRINT EXACT SEAT NAME (if applicable)

1. **Name:** Ramirez, Patricia Lynn
 (Last Name) (First Name) (Middle Name)

2. **Address:** 2999 Oak Road, Suite 1030 Walnut Creek CA 94597
 (No.) (Street) (Apt.) (City) (State) (Zip Code)

3. **Phones:** Work: 925-952-5248
 (Home No.) (Work No.) (Cell No.)

4. **Email Address:** patricia.ramirez@raymondjames.com

5. **EDUCATION:** Check appropriate box if you possess one of the following:

High School Diploma G.E.D. Certificate California High School Proficiency Certificate

Give Highest Grade or Educational Level Achieved 12th Grade

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Units Completed		Degree Type	Date Degree Awarded
			Semester	Quarter		
A) Diablo Valley College	General Education	Yes No <input checked="" type="checkbox"/>	18 units	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B)		Yes No <input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C)		Yes No <input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D) Other schools / training completed FINRA Series 7, 63, 66, 9 & 10	Course Studied Gen'l Securities Exam, Principal Supervisory Exam, State Securities	Hours Completed	Certificate Awarded: Yes No <input checked="" type="checkbox"/>			

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) <u>From</u> <u>To</u> 04/2015 present</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 7 1/2 mo.</p> <p>Hrs. per week _____ . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>Financial Advisor</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>Raymond James & Associates, Inc. 2999 Oak Road, Suite 1030 Walnut Creek, CA 94597</p>	<p style="text-align: center;">Duties Performed</p> <p>Develop new relationships/clients, financial discovery, analysis, planning & monitoring, investment analysis, planning, implementation & monitoring, relationship manager for existing clients, marketing & events, financial education & seminars</p>
<p>B) Dates (Month, Day, Year) <u>From</u> <u>To</u> 09/1999 04/2015</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 15 years 2 1/2 mo.</p> <p>Hrs. per week _____ . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>Morgan Stanley/Smith Barney</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>555 California St., 35 Floor San Francisco, CA</p>	<p style="text-align: center;">Duties Performed</p> <p>Team member of a client base of over \$400 million in assets, relationship manager, 2014 Morgan Stanley Pacesetter Club, client appreciation & educational events, portfolio management & rebalancing, financial planning, collaborated with team in monthly investment meetings.</p>
<p>C) Dates (Month, Day, Year) <u>From</u> <u>To</u> 08/2015 present</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 3 1/2 mo.</p> <p>Hrs. per week <u>2</u> _____ . Volunteer <input checked="" type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>Board Member</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>National Association of Professional Women - Walnut Creek Chapter</p>	<p style="text-align: center;">Duties Performed</p> <p>Responsible for Facebook NAPW page, NAPW Eventbrite (monthly invitations for over 400 members), collaborative monthly planning with NAPW Board Members.</p>
<p>D) Dates (Month, Day, Year) <u>From</u> <u>To</u> <input type="text"/> <input type="text"/></p> <p>Total: <u>Yrs.</u> <u>Mos.</u> <input type="text"/> <input type="text"/></p> <p>Hrs. per week _____ . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p><input type="text"/></p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p><input type="text"/></p>	<p style="text-align: center;">Duties Performed</p> <p><input type="text"/></p>

7. How did you learn about this vacancy?

CCC Homepage Walk-In Newspaper Advertisement District Supervisor Other Phyllis Gordon, Mary Rosas

8. Do you have a Familial or Financial Relationship with a member of the Board of Supervisors? (Please see Board Resolution no. 2011/55, attached): No Yes

If Yes, please identify the nature of the relationship:

9. Do you have any financial relationships with the County such as grants, contracts, or other economic relations? No Yes

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I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publically accessible. I understand and agree that misstatements / omissions of material fact may cause forfeiture of my rights to serve on a Board, Committee, or Commission in Contra Costa County.

Sign Name: Patricia X. Ramirez Date: 11-26-2015

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no. 2011/55 on 2/08/2011 as follows:**

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 4. First cousin;
 5. Husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepson, and stepdaughter;
 6. Sister-in-law (brother's spouse or spouse's sister), brother-in-law (sister's spouse or spouse's brother), spouse's grandmother, spouse's grandfather, spouse's granddaughter, and spouse's grandson;
 7. Registered domestic partner, pursuant to California Family Code section 297.
 8. The relatives, as defined in 5 and 6 above, for a registered domestic partner.
 9. Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or business associate.

BrokerCheck Report

PATRICIA LYNN RAMIREZ

CRD# 2093341

Report #88797-75646, data current as of Monday, November 23, 2015.

<u>Section Title</u>	<u>Page(s)</u>
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About BrokerCheck®

BrokerCheck offers information on all current, and many former, registered securities brokers, and all current and former registered securities firms. FINRA strongly encourages investors to use BrokerCheck to check the background of securities brokers and brokerage firms before deciding to conduct, or continue to conduct, business with them.

- **What is included in a BrokerCheck report?**

BrokerCheck reports for individual brokers include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards. BrokerCheck reports for brokerage firms include information on a firm's profile, history, and operations, as well as many of the same disclosure events mentioned above.

Please note that the information contained in a BrokerCheck report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the broker or brokerage firm, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

- **Where did this information come from?**

The information contained in BrokerCheck comes from FINRA's Central Registration Depository, or CRD® and is a combination of:

- information FINRA and/or the Securities and Exchange Commission (SEC) require brokers and brokerage firms to submit as part of the registration and licensing process, and
- information that regulators report regarding disciplinary actions or allegations against firms or brokers.

- **How current is this information?**

Generally, active brokerage firms and brokers are required to update their professional and disciplinary information in CRD within 30 days. Under most circumstances, information reported by brokerage firms, brokers and regulators is available in BrokerCheck the next business day.

- **What if I want to check the background of an investment adviser firm or investment adviser representative?**

To check the background of an investment adviser firm or representative, you can search for the firm or individual in BrokerCheck. If your search is successful, click on the link provided to view the available licensing and registration information in the SEC's Investment Adviser Public Disclosure (IAPD) website at <http://www.adviserinfo.sec.gov>. In the alternative, you may search the IAPD website directly or contact your state securities regulator at <http://www.finra.org/investors/ToolsCalculators/BrokerCheck/P455414>.

- **Are there other resources I can use to check the background of investment professionals?**

FINRA recommends that you learn as much as possible about an investment professional before deciding to work with them. Your state securities regulator can help you research brokers and investment adviser representatives doing business in your state.

Thank you for using FINRA BrokerCheck.



Using this site/information means that you accept the FINRA BrokerCheck Terms and Conditions. A complete list of Terms and Conditions can be found at brokercheck.finra.org



For additional information about the contents of this report, please refer to the User Guidance or www.finra.org/brokercheck. It provides a glossary of terms and a list of frequently asked questions, as well as additional resources. For more information about FINRA, visit www.finra.org.



PATRICIA L. RAMIREZ
CRD# 20933341

Currently employed by and registered with the following Firm(s):

RAYMOND JAMES & ASSOCIATES, INC.
2999 OAK ROAD
SUITE 1030
WALNUT CREEK, CA 94597
CRD# 705
Registered with this firm since: 04/10/2015

Report Summary for this Broker

This report summary provides an overview of the broker's professional background and conduct. Additional information can be found in the detailed report.

Broker Qualifications

This broker is registered with:

- 5 Self-Regulatory Organizations
- 10 U.S. states and territories

This broker has passed:

- 2 Principal/Supervisory Exams
- 1 General Industry/Product Exam
- 2 State Securities Law Exams

Registration History

This broker was previously registered with the following securities firm(s):

- MORGAN STANLEY**
CRD# 149777
SAN FRANCISCO, CA
06/2009 - 04/2015
- CITIGROUP GLOBAL MARKETS INC.**
CRD# 7059
BERKELEY, CA
03/1999 - 06/2009
- LINSCO/PRIVATE LEDGER CORP.**
CRD# 6413
BOSTON, MA
09/1998 - 02/1999

Disclosure Events

All individuals registered to sell securities or provide investment advice are required to disclose customer complaints and arbitrations, regulatory actions, employment terminations, bankruptcy filings, and criminal or civil judicial proceedings.

Are there events disclosed about this broker? **No**

Investment Adviser Representative Information

The information below represents the individual's record as a broker. For details on this individual's record as an investment adviser representative, visit the SEC's Investment Adviser Public Disclosure website at <http://www.adviserinfo.sec.gov>



Broker Qualifications

Registrations

This section provides the self-regulatory organizations (SROs) and U.S. states/territories the broker is currently registered and licensed with, the category of each license, and the date on which it became effective. This section also provides, for every brokerage firm with which the broker is currently employed, the address of each branch where the broker works.

This individual is currently registered with 5 SROs and is licensed in 10 U.S. states and territories through his or her employer.

Employment 1 of 1

Firm Name: **RAYMOND JAMES & ASSOCIATES, INC.**
 Main Office Address: **880 CARILLON PARKWAY**
ST. PETERSBURG, FL 33716
 Firm CRD#: **705**

SRO	Category	Status	Date
FINRA	General Securities Representative	APPROVED	04/10/2015
FINRA	General Securities Sales Supervisor	APPROVED	04/10/2015
NASDAQ OMX PHLX, Inc.	General Securities Representative	APPROVED	04/10/2015
NASDAQ OMX PHLX, Inc.	General Securities Sales Supervisor	APPROVED	04/10/2015
NASDAQ Stock Market	General Securities Representative	APPROVED	04/10/2015
NASDAQ Stock Market	General Securities Sales Supervisor	APPROVED	04/10/2015
NYSE MKT LLC	Branch Office Manager (NYSE)	APPROVED	04/10/2015
NYSE MKT LLC	General Securities Representative	APPROVED	04/10/2015
New York Stock Exchange	Branch Office Manager (NYSE)	APPROVED	04/10/2015
New York Stock Exchange	General Securities Representative	APPROVED	04/10/2015

U.S. State/ Territory	Category	Status	Date	U.S. State/ Territory	Category	Status	Date
California	Agent	APPROVED	04/10/2015	Minnesota	Agent	APPROVED	04/10/2015
Illinois	Agent	APPROVED	04/10/2015	New Mexico	Agent	APPROVED	04/10/2015
Iowa	Agent	APPROVED	07/01/2015	New York	Agent	APPROVED	04/10/2015
Maryland	Agent	APPROVED	04/10/2015	Oregon	Agent	APPROVED	04/10/2015
Michigan	Agent	APPROVED	04/10/2015	Washington	Agent	APPROVED	04/10/2015

Broker Qualifications

Employment 1 of 1, continued

Branch Office Locations

RAYMOND JAMES & ASSOCIATES, INC.
2999 OAK ROAD
SUITE 1030
WALNUT CREEK, CA 94597

Broker Qualifications

Industry Exams this Broker has Passed

This section includes all securities industry exams that the broker has passed. Under limited circumstances, a broker may attain a registration after receiving an exam waiver based on exams the broker has passed and/or qualifying work experience. Any exam waivers that the broker has received are not included below.

This individual has passed 2 principal/supervisory exams, 1 general industry/product exam, and 2 state securities law exams.

Principal/Supervisory Exams

Exam

Exam	Category	Date
General Securities Sales Supervisor - Options Module Examination	Series 9	09/13/2000
General Securities Sales Supervisor - General Module Examination	Series 10	10/25/2000

General Industry/Product Exams

Exam

Exam	Category	Date
General Securities Representative Examination	Series 7	05/20/1998

State Securities Law Exams

Exam

Exam	Category	Date
Uniform Securities Agent State Law Examination	Series 63	06/02/1998
Uniform Combined State Law Examination	Series 66	09/04/2007

Additional information about the above exams or other exams FINRA administers to brokers and other securities professionals can be found at www.finra.org/brokerqualifications/registerdep/.





Registration and Employment History

Registration History

The broker previously was registered with the following firms:

Registration Dates	Firm Name	CRD#	Branch Location
06/2009 - 04/2015	MORGAN STANLEY	149777	SAN FRANCISCO, CA
03/1999 - 06/2009	CITIGROUP GLOBAL MARKETS INC.	7059	BERKELEY, CA
09/1998 - 02/1999	LINSCO/Private Ledger Corp	6413	BOSTON, MA
05/1998 - 08/1998	ROUND HILL SECURITIES, INC.	35223	ALAMO, CA

Employment History

This section provides up to 10 years of an individual broker's employment history as reported by the individual broker on the most recently filed Form U4.

Please note that the broker is required to provide this information only while registered with FINRA or a national securities exchange and the information is not updated via Form U4 after the broker ceases to be registered. Therefore, an employment end date of "Present" may not reflect the broker's current employment status.

Employment Dates	Employer Name	Employer Location
04/2015 - Present	RAYMOND JAMES & ASSOCIATES, INC	WALNUT CREEK, CA
01/2015 - 04/2015	MORGAN STANLEY PRIVATE BANK, NATIONAL ASSOCIAT	NEW YORK, NY
06/2009 - 04/2015	MORGAN STANLEY SMITH BARNEY	BERKELEY, CA
02/1999 - 04/2015	CITIGROUP GLOBAL MARKETS INC.	BERKELEY, CA

Other Business Activities

This section includes information, if any, as provided by the broker regarding other business activities the broker is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious or fraternal and is recognized as tax exempt.

(1) RENTAL PROPERTY IN LAS CRUCES, NM
 ADDRESS: CONCORD, CA
 NATURE OF THE BUSINESS: RENTAL REAL ESTATE
 POSITION/TITLE: PROPRIETOR/OWNER
 INVESTMENT RELATED: NO
 START DATE: 06/16/2015
 HOURS PER MONTH DEVOTED TO THIS BUSINESS: 2
 HOURS PER MONTH DEVOTED TO THIS BUSINESS DURING TRADING HOURS: 0

Registration and Employment History



Other Business Activities, continued

DESCRIPTION OF DUTIES: MY HUSBAND & I OWN RENTAL PROPERTY IN LAS CRUCES, NEW MEXICO, THAT IS RENTED AS A VACATION HOME. WE DECIDE WHO CAN RENT THE PROPERTY, I PAY ALL EXPENSES INCLUDING A PROPERTY MANAGER AND HANDLE ALL PAPERWORK.

(2) National Association of Professional Women

Address: Concord, CA

Nature of the Business: Board Member/Officer/Director

Position/Title: Board Member/Officer/Director

Investment Related: No

Start Date: 09/01/2015

Hours per month devoted to this business: 5

Hours per month devoted to this business during trading hours: 0

Description of duties: Committee Chair - Memberships; recruit, select, orient new members.



End of Report

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P. Ramirez
3921 Beechwood Dr.
Lumera, CA 94519

RECEIVED
DEC 03 2015
CLERK BOARD OF SUPERVISORS
CONTRA COSTA CO.

Contra Costa County
Clerk of the Board
651 Pine St., Room 104
Martinez, CA 94553 -1292

9455312929





CONTRA COSTA COMMISSION FOR WOMEN

P.O. Box 6695

Concord, CA 94520

E-Mail: womenscommission@gmail.com

DATE: January 26, 2016 TO: Family and Human Services Committee

FROM: Phyllis L. Gordon, Membership Chair, Contra Costa Commission for Women

SUBJECT: Recommended Appointments to the Contra Costa Commission for Women

The purpose of this memorandum is to forward to you the following recommendation from the Contra Costa Commission for Women (CCCW):

- Appoint Natalie Oleas to At Large Seat 10 on the CCCW

Background

The Contra Costa Commission for Women was formed to educate the community and advise the Contra Costa County Board of Supervisors and other entities on the issues relating to the changing social and economic conditions of women in the County, with particular emphasis on the economically disadvantaged.

The Committee consists of 25 members and one alternate, including:

- Five district representatives; (one from each supervisorial; districts)
- Twenty at large members; and
- One at large alternate.

The five district representatives are nominated for a three year term by each of the five members of the Board of Supervisors. The twenty at large members and one at large alternate are nominated by the CCCW membership committee and forwarded to the full CCCW. All nominated appointments to the CCCW are reviewed by the Family and Human Services Committee (IOC) and referred to the Board of Supervisors for approval. CCCW terms are for three years and they are staggered across the membership. A current CCCW roster, as of May 22, 2013, is attached for your information (Attachment A).

Current Status of Appointments

The CCCW have been actively recruiting applicants on an ongoing basis to fill the vacant seats.

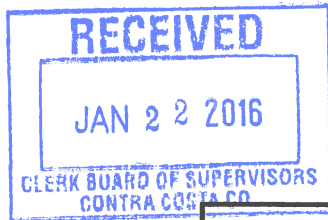
The membership committee unanimously approved the above recommendations.

As of January 26, 2016 there are 14 at large vacancies and a District 3 appointee opening . The At Large Alternate seat is also vacant.

If the appointment recommended in this memorandum is ultimately approved, another at large seat will be filled. The vacancies remaining after approval would be 11 at large seats and one alternate. With two others applicants in process (interviews) as of January 1, 2016.

Since May 2004, the CCCW has had extremely limited staff support and no budget provided by the County. However, the CCCW membership committee is continuing its recruiting efforts and plans to fill the remaining vacancies within the next few months.

cc without attachment : CCCW Membership Committee/Gordon, Chair
 Enid Mendoza, CAO



Print Form



Contra
Costa
County

For Office Use Only
Date Received:

For Reviewers Use Only:
Accepted Rejected

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

MAIL OR DELIVER TO:
Contra Costa County
CLERK OF THE BOARD
651 Pine Street, Rm. 106
Martinez, California 94553-1292
PLEASE TYPE OR PRINT IN INK
(Each Position Requires a Separate Application)

BOARD, COMMITTEE OR COMMISSION NAME AND SEAT TITLE YOU ARE APPLYING FOR:

Commission for Women

At-Large

PRINT EXACT NAME OF BOARD, COMMITTEE, OR COMMISSION

PRINT EXACT SEAT NAME (if applicable)

1. Name: Oleas Natalie Rose
(Last Name) (First Name) (Middle Name)

2. Address: 1189 Kaski Lane #A Concord CA 94518
(No.) (Street) (Apt) (City) (State) (Zip Code)

3. Phones: 408-832-6591
(Home No.) (Work No.) (Cell No.)

4. Email Address: nroleas@gmail.com

5. EDUCATION: Check appropriate box if you possess one of the following:

High School Diploma G.E.D. Certificate California High School Proficiency Certificate

Give Highest Grade or Educational Level Achieved Graduate

Names of colleges / universities attended	Course of Study / Major	Degree Awarded Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>	Units Completed		Degree Type	Date Degree Awarded
			Semester	Quarter		
A) Northeastern University School of Law	Law	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>	N/A	N/A	J.D.	2011
B) University of California, Santa Barbara	English and Sociology	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>	N/A	N/A	B.A.	2008
C) Santa Barbara City College	Law and Society, Liberal Studies	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>	N/A	N/A	A.A.	2006
D) Other schools / training completed: CA Certified Rape Crisis Counselor	Course Studied	Hours Completed 80	Certificate Awarded: Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) From To <input type="text" value="05-01-2015"/> <input type="text" value="Current"/> Total: Yrs. Mos. <input type="text" value="0"/> <input type="text" value="7"/> Hrs. per week <input type="text" value="2"/> . Volunteer <input checked="" type="checkbox"/></p>	<p>Title <input type="text" value="Family Justice Center Volunteer"/> Employer's Name and Address <input type="text" value="Contra Costa Family Justice Center"/> <input type="text" value="2151 Salvio Street,"/> <input type="text" value="Concord, CA"/></p>	<p>Duties Performed <input type="text" value="Co-presenter for the WINGS (Women Inspired to Grow and Succeed) program. The WINGS program teaches survivors of trauma basic life skills such as writing a resume, balancing a budget, and setting goals."/></p>
<p>B) Dates (Month, Day, Year) From To <input type="text" value="04-01-2015"/> <input type="text" value="Current"/> Total: Yrs. Mos. <input type="text" value="0"/> <input type="text" value="8"/> Hrs. per week <input type="text" value="N/A"/> . Volunteer <input checked="" type="checkbox"/></p>	<p>Title <input type="text" value="CA Certified Rape Crisis Counselor"/> Employer's Name and Address <input type="text" value="San Francisco Women Against Rape"/> <input type="text" value="3543 18th St."/> <input type="text" value="San Francisco, CA"/></p>	<p>Duties Performed <input type="text" value="Completed 80 hours of California rape crisis counselor state mandated training. Training includes learning to support survivors of sexual assault in their emotional, medical, and legal needs after an assault has been disclosed."/></p>
<p>C) Dates (Month, Day, Year) From To <input type="text" value="07-01-2015"/> <input type="text" value="12-01-2015"/> Total: Yrs. Mos. <input type="text" value="0"/> <input type="text" value="5"/> Hrs. per week <input type="text" value="40"/> . Volunteer <input type="checkbox"/></p>	<p>Title <input type="text" value="Manager of Legal Operations"/> Employer's Name and Address <input type="text" value="Tavistock Restaurant Group"/> <input type="text" value="2600 10th Street"/> <input type="text" value="Berkeley, CA"/></p>	<p>Duties Performed <input type="text" value="Managed legal operations for the in-house counsel of a restaurant corporation with 140 chains."/></p>
<p>D) Dates (Month, Day, Year) From To <input type="text"/> <input type="text"/> Total: Yrs. Mos. <input type="text"/> <input type="text"/> Hrs. per week <input type="text"/> . Volunteer <input type="checkbox"/></p>	<p>Title <input type="text"/> Employer's Name and Address <input type="text"/></p>	<p>Duties Performed <input type="text"/></p>

7. How did you learn about this vacancy?

CCC Homepage Walk-In Newspaper Advertisement District Supervisor Other

8. Do you have a Familial or Financial Relationship with a member of the Board of Supervisors? (Please see Board Resolution no. 2011/55, attached): No Yes

If Yes, please identify the nature of the relationship:

9. Do you have any financial relationships with the County such as grants, contracts, or other economic relations? No Yes

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publically accessible. I understand and agree that misstatements / omissions of material fact may cause forfeiture of my rights to serve on a Board, Committee, or Commission in Contra Costa County.

Sign Name:  Date: 12/12/2015

Important Information

1. This application is a public document and is subject to the California Public Records Act (CA Gov. Code §6250-6270).
2. Send the completed paper application to the Office of the Clerk of the Board at **651 Pine Street, Room 106, Martinez, CA 94553**.
3. A résumé or other relevant information may be submitted with this application.
4. All members are required to take the following training: 1) The Brown Act, 2) The Better Government Ordinance, and 3) Ethics Training.
5. Members of boards, commissions, and committees may be required to: 1) file a Statement of Economic Interest Form also known as a Form 700, and 2) complete the State Ethics Training Course as required by AB 1234.
6. Advisory body meetings may be held in various locations and some locations may not be accessible by public transportation.
7. Meeting dates and times are subject to change and may occur up to two days per month.
8. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.

**THE BOARD OF SUPERVISORS OF CONTRA COSTA COUNTY, CALIFORNIA and for
Special Districts, Agencies and Authorities Governed by the Board Adopted Resolution
no. 2011/55 on 2/08/2011 as follows:**

IN THE MATTER OF ADOPTING A POLICY MAKING FAMILY MEMBERS OF THE BOARD OF SUPERVISORS INELIGIBLE FOR APPOINTMENT TO BOARDS, COMMITTEES OR COMMISSIONS FOR WHICH THE BOARD OF SUPERVISORS IS THE APPOINTING AUTHORITY

WHEREAS the Board of Supervisors wishes to avoid the reality or appearance of improper influence or favoritism;
NOW, THEREFORE, BE IT RESOLVED THAT the following policy is hereby adopted:

- I. SCOPE: This policy applies to appointments to any seats on boards, committees or commissions for which the Contra Costa County Board of Supervisors is the appointing authority.
- II. POLICY: A person will not be eligible for appointment if he/she is related to a Board of Supervisors' Member in any of the following relationships:
1. Mother, father, son, and daughter;
 2. Brother, sister, grandmother, grandfather, grandson, and granddaughter;
 3. Great-grandfather, great-grandmother, aunt, uncle, nephew, niece, great-grandson, and great-granddaughter;
 4. First cousin;
 5. Husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepson, and stepdaughter;
 6. Sister-in-law (brother's spouse or spouse's sister), brother-in-law (sister's spouse or spouse's brother), spouse's grandmother, spouse's grandfather, spouse's granddaughter, and spouse's grandson;
 7. Registered domestic partner, pursuant to California Family Code section 297.
 8. The relatives, as defined in 5 and 6 above, for a registered domestic partner.
 9. Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or business associate.