

# Application Form

Status: submitted

## Profile

This application is used for all boards and commissions

Jay \_\_\_\_\_ Kwon \_\_\_\_\_  
 First Name Middle Initial Last Name

\_\_\_\_\_  
 Email Address

\_\_\_\_\_  
 Home Address Suite or Apt

Danville \_\_\_\_\_ CA \_\_\_\_\_ 94526 \_\_\_\_\_  
 City State Postal Code

Home: \_\_\_\_\_  
 Primary Phone

City of San Jose \_\_\_\_\_ Investment Officer \_\_\_\_\_ External Investment Manager \_\_\_\_\_  
 Employer Job Title Occupation

**Do you, or a business in which you have a financial interest, have a contract with Contra Costa Co.?**

Yes  No

**Is a member of your family (or step-family) employed by Contra Costa Co.?**

Yes  No

## Interests & Experiences

**Which Boards would you like to apply for?**

Contra Costa County Employees Retirement Association (CCCERA)

**Please describe your interest in serving as a member of the board(s) you have selected and if applicable which seat you are applying for.**

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I am applying for an Appointed Seat on the CCCERA Retirement Board. I am currently an Investment Officer at the Office of Retirement Services for the City of San Jose, and have a deep-seated professional interest in the management of public pension systems. Additionally, as a Contra Costa County resident, I have a vested interest in the health and viability of CCCERA. I feel that I can provide a unique perspective informed by my professional experience working with (and for) public pensions for nearly 15 years.

**Have you previously served on a government or non-profit board or committee?**

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No

**Please describe how your education, work experience, or other activities have prepared you to serve on the board or commission you have selected.**

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I work as an Investment Officer at the Office of Retirement Services for the City of San Jose. I am part of a team that manages a combined \$5B in assets for the City's two defined benefit pension plans. Most of what I do as a part of the investment team is analogous to the role that CCCERA's investment staff performs; my daily professional responsibilities provide directly applicable insights to the issues confronting the CCCERA Board. Additionally, much of my prior work experience involved structuring custom investment solutions for public pensions, which should aid my ability to evaluate the complex issues facing the CCCERA Board. My professional experience, in combination with educational credentials (BA Economics, MA Economics, MBA, CFA and CAIA charter holder), would aid my ability to complete my fiduciary duties as a Board member, and could add value to the existing Board.

[Jay Kwon -- resume.docx](#)

Upload a Resume

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## Work History

Please provide information on your last three positions, including your current one if you are working.

### 1st (Most Recent)

9/2/14 - present

Dates (Month, Day, Year) From - To

60

Hours per Week Worked?

## Volunteer Work?

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Yes  No

Investment Officer

Position Title

## Employer's Name and Address

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1737 North First Street, 6th Floor, San José CA 95112

## Duties Performed

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Manage the Public Equity allocation of the City's pension plans to maximize plan level risk-adjusted returns

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## 2nd

9/1/08 - 9/1/14

Dates (Month, Day, Year) From - To

60

Hours per Week Worked?

## Volunteer Work?

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Yes  No

Senior Portfolio Manager

Position Title

## Employer's Name and Address

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Bank of New York Mellon Beta and Transition Management 50 Fremont, Ste 1600, San Francisco, CA 94105

## Duties Performed

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Lead PM for a product line of derivatives-based hedging and overlay solutions.

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## 3rd

9/1/03 - 9/1/07

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Dates (Month, Day, Year) From - To

60

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Hours per Week Worked?

## Volunteer Work?

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Yes  No

Portfolio Manager / Trader

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Position Title

## Employer's Name and Address

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Mellon Transition Management Services; San Francisco, CA 50 Fremont, Ste 1600, San Francisco, CA 94105

## Duties Performed

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Managed fixed income portfolio transitions.