

Application Form

Profile

Paula _____ A _____ Troy _____
 First Name Middle Initial Last Name

Home Address _____ Suite or Apt _____
 Martinez _____ CA _____ 94553 _____
 City State Postal Code

Primary Phone _____

Email Address _____

Which supervisorial district do you live in?

None Selected

 Seat Name

Education

Select the option that applies to your high school education *

High School Diploma

College/ University A

California State University
 Sacramento _____
 Name of College Attended

BS, Finance _____
 Degree Type / Course of Study / Major

Degree Awarded?

Yes No

College/ University B

 Name of College Attended

Degree Type / Course of Study / Major

Degree Awarded?

 Yes No

College/ University C

Name of College Attended

Degree Type / Course of Study / Major

Degree Awarded?

 Yes No

Other schools / training completed:

Course Studied

Hours Completed

Certificate Awarded?

 Yes No

Board and Interest

Which Boards would you like to apply for?

Contra Costa County Employees Retirement Association (CCCERA): Submitted

Seat Name

Have you ever attended a meeting of the advisory board for which you are applying?

 Yes No

If you have attended, how many meetings have you attended?

Please explain why you would like to serve on this particular board, committee, or commission.

My background is with Public Funds, attending board meetings, working for State Street Bank as the custodian for Public Funds. I have a passion for knowledge of investments and am familiar with unfunded liabilities associated with Public Funds. I would love to serve on the board, with my previous knowledge of investments and public funds.

Qualifications and Volunteer Experience

I would like to be considered for appointment to other advisory boards for which I may be qualified.

Yes No

Are you currently or have you ever been appointed to a Contra Costa County advisory board, commission, or committee?

Yes No

List any volunteer or community experience, including any advisory boards on which you have served.

Have been a member of SACRS.

Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)

Financial Services Professional with in-depth experience in client service and operational management. Proven record working with very large public fund clients that range in portfolio size and complexity. Recognized for establishing, nurturing, and retaining valuable clients and relationships. Known for working closely with a variety of partner organizations and internal departments in the coordination of services and information, ensuring that client needs are met.

[TroyP_resume_2018.docx](#)

Upload a Resume

Conflict of Interest and Certification

Do you have a Familial or Financial Relationship with a member of the Board of Supervisors?

Yes No

If Yes, please identify the nature of the relationship:

Do you have any financial relationships with the County such as grants, contracts, or other economic relations?

Yes No

If Yes, please identify the nature of the relationship:

Please Agree with the Following Statement

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 publicly accessible. I understand that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.

I Agree

PAULA TROY

Martinez, California 94553 ☐

☐

SUMMARY OF EXPERIENCE

Financial Services Professional with in-depth experience in client service and operational management. Proven record working with very large public fund clients that range in portfolio size and complexity. Recognized for establishing, nurturing, and retaining valuable clients and relationships. Known for working closely with a variety of partner organizations and internal departments in the coordination of services and information, ensuring that client needs are met.

PROFESSIONAL EXPERIENCE

AMG/STANTEC/CITY OF PLEASANT HILL/ TRANSPAC / 511 CONTRA COSTA Pleasant Hill, CA
2013-PRESENT

Project Controls Specialist

Management of project and program budgets, cost control functions including budgeting, estimating, and forecasting. Process invoices, expenditure tracking, compile monthly reimbursement invoices, payroll reconciliation and maintaining related records with Contra Costa Transportation Authority. Carpool Instead incentive distribution, coordination of the Contra Costa County Library's Discover & Go transit promotion, Employer outreach, SchoolPool, and commute incentives. Maintain access databases and assist with audits.

STATE STREET CALIFORNIA, INC., Alameda, California

1992 - 2011

Client Service Officer

1998 - 2011

Managed all aspects of client service relationships for 7 Public Fund Clients worth \$35 billion. Facilitated client requests and deliverables, ensuring compliance with internal and external regulations, procedures, and controls while ensuring client satisfaction and retention.

- Implemented efficiencies with a significant reduction of exceptions by centralizing daily functions within the accounting team.
- Developed and implemented significant reductions through efficiencies and outsourcing, resulting in a reduction of turnover from 25% to 10%.
- Created procedure manuals for all online system access for daily and monthly activity for hedge fund/commingled portfolios.
- Researched, analyzed, and presented all P&L sheets in a clear concise form, projecting changes in revenue, operating income, cash position, and compensation calculations.
- Presented to Public Retirement Boards for service updates, education, RFP's.
- Received the Quality Management Award.

Client Service Manager

1995 - 1998

Managed 14 portfolio accountants and 3 Quality Control Specialists in a dynamic team environment. Maintained accurate daily fund accounting records for 21 Public Fund Clients.

- Increased client satisfaction through improved performance and delivery of vital financial information.
- Improved cash operation accuracy and efficiency, contributing to client satisfaction as indicated on client survey.

Quality Control Specialist

1994 - 1995

Responsible for the training and development of new Portfolio Accountants.

- Developed and implemented operating procedures for consistency and improved delivery of client service at all levels.
- Ensured internal and external reporting met established quality standards and developed new processes/documents for complex client reporting.

Portfolio Accountant

1992 - 1994

Responsible for accounting of securities of pension funds including general ledger accounting, pricing, and verification of daily financial statements. Proofed account balances on global and domestic funds as well.

TRAINING AND EDUCATION

Compliance (GASB40, GASB53), Money Laundering, and Diversity
B.S. Business Administration, Finance concentration - California State University, Sacramento