

JUN 23 2021

City Clerk Department



CITY OF SAN CLEMENTE INVESTMENT ADVISORY COMMITTEE APPLICATION

1. Name Ryan Bourque

2. How long have you lived in San Clemente? 8 years

3. What is your occupation? Certified Public Accountant

4. Do you wish to be considered for one of the two citizen at-large positions on the Investment Advisory Committee (to be appointed by City Council) or the Industry Specialist position (to be appointed by the City Treasurer)?

I'm interested in the citizen at-large position only. (San Clemente residency required)

I'm interested in the Industry Specialist position only. (San Clemente residency not required)

I'm interested in either a citizen at-large or Industry Specialist position.

5. Please explain why you would like to serve on the Investment Advisory Committee.

I would like to ensure proper stewardship and adherence to the city investment policy. I would like to be a part of the meetings and discuss the rationale behind decisions made. I hope to be a voice of common sense and reason

6. Please explain how your background and experience would contribute to the Investment Advisory Committee.

I have a 15+ year career as a Certified Public Accountant and am awaiting approval to join Avantax Wealth Management as an Investment Advisor. I figured I could learn a lot which is why I am seeking the citizen-at-large position.

7. What is your educational background?

High School/Colleges Attended	Major Field of Study	Degree?
Ontario Christian High School	HS	Diploma
Chapman University	BS.A	Yes
University of Southern California (USC)	MB.T	Yes

8. Please explain any experience that you have in community, governmental, charitable or educational affairs.

I have volunteered for Saddleback Church for over 12 years in the capacities of financial stewardship ministries teaching on Biblical money management as well as providing guidance to those in the areas of budgets, counseling, and financial planning.

I also worked in college as a City Management Intern for the City of Orange. There I worked on the City Budget compilation and presentation before the city.

I am on the board of the applied accounting program, Subject Matter Expert, and former instructor for UC Irvine Department of Continuing Education.

9. Please describe your understanding of the principal roles and responsibilities of the Investment Advisory Committee.

My understanding is the committee reviews and discusses investments with the confines of the Investment policy.

10. Please use the space below to explain any other factors about yourself that you would like for the Council members to consider as they review your application.

I have an eye for stewardship and feel that minds from different backgrounds can add perspective to a committee.

PLEASE ATTACH YOUR MOST RECENT RESUME TO THE APPLICATION, IF AVAILABLE.

Chase, Jason

From: Ryan Bourque, CPA <rb@ryanbourquecpa.com>
Sent: Wednesday, May 11, 2022 8:59 AM
To: Campagnolo, Laura
Cc: Chase, Jason
Subject: Re: City Commission/Committee Terms Set to Expire on June 30, 2022

Jason

Please use my previous applicat

Sincerely,

Ryan Bourque, CPA
Principal
Bourque CPAs + Advisors, Inc.
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From: Campagnolo, Laura <CampagnoloL@san-clemente.org>
Sent: Thursday, May 5, 2022 10:23:45 AM
Cc: Chase, Jason <ChaseJ@san-clemente.org>
Subject: City Commission/Committee Terms Set to Expire on June 30, 2022

Commission and Committee Members:

I am writing you because your term on your City Commission/Commission is set to expire on June 30, 2022. At its meeting of April 19, 2022, Council set interview dates for June 1 and June 15, 2022. As part of the discussion, City Council permitted previously submitted applications to be used for those individuals who were most recently appointed to Commissions/Committees, and are interested in re-applying. The deadline to submit applications is May 24, 2022. If you would like to reapply using your past application, please email it to Jason Chase, Records Management Coordinator, at chasej@san-clemente.org. If you would like a copy of your previously submitted application, please let Jason or me know and we will email you a copy.

We will send notifications for interview dates once the application deadline ends on May 24th.

Thank you.

Laura

Laura Campagnolo | Legislative Administrator