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MEMORANDUM

To: Clerk of the Board

From: Vice Chairman Donald P. Wagner, Third District

Date: July 21, 2022

RE: Appointment of Rachel Owens to the Orange County Senior Citizens Advisory Council

I would like to appoint Rachel Owens to the Orange County Senior Citizens Advisory Council with the term dates of January 1, 2021 to December 31, 2022. Rachel Owens will fill the seat previously held by Susan Dobak. Please add this as an item to the August 9, 2022 Board of Supervisors meeting.



APPLICATION FOR COUNTY OF ORANGE
BOARD, COMMISSION OR COMMITTEE

(FOR COUNTY USE ONLY)

Return to:

Clerk of the Board of Supervisors
333 West Santa Ana Blvd., Suite 465
Santa Ana, California 92701
Website: www.ocgov.com/gov/cob/

Instructions: Please complete each section below. Be sure to enter the title of the Board, Commission or Committee for which you desire consideration. For information or assistance, please contact the Clerk of the Board of Supervisor's Office at (714) 834-2206. Please print in ink or type. This application shall be maintained for a period of 1 year. After one year, it is necessary to file a new application for another year of eligibility.

BOARD, COMMISSION, OR COMMITTEE TO WHICH YOU ARE APPLYING FOR MEMBERSHIP:

Senior Citizens Advisory Council

SUPERVISORIAL DISTRICT IN WHICH YOU RESIDE: ☐ First ☐ Second ☒ Third ☐ Fourth ☐ Fifth

APPLICANT NAME AND RESIDENCE ADDRESS:

Rachel A Owens
First Name Middle Name Last Name
Irvine CA
Street Address City State Zip Code
Home Phone Number Cell Phone Number
Email Address

CURRENT EMPLOYER:

OCCUPATION/JOB TITLE:

BUSINESS ADDRESS:

BUSINESS PHONE NUMBER:

ARE YOU A CITIZEN OF THE UNITED STATES: ☒ YES ☐ NO

NAME OF COUNTRY OF CITIZENSHIP: USA

ARE YOU A REGISTERED VOTER? ☒ YES ☐ NO

IF YES, NAME COUNTY YOU ARE REGISTERED IN: Orange

EMPLOYMENT HISTORY: Please attach a resume to this application and provide any information that would be helpful in evaluating your application.

LIST ALL CURRENT PROFESSIONAL OR COMMUNITY ORGANIZATIONS AND SOCIETIES OF WHICH YOU ARE A MEMBER.

ORGANIZATION/SOCIETY	FROM (MO./YR.)	TO (MO./YR.)
Senior Council- City of Irvine	11-2022	Present
Seving People in Need	01-2010	Present

WITHIN THE LAST FIVE YEARS, HAVE YOU BEEN AFFILIATED WITH ANY BUSINESS OR NONPROFIT AGENCY(IES)? ☒ YES ☐ NO

DO YOU OWN REAL OR PERSONAL PROPERTY OR HAVE FINANCIAL HOLDING WHICH MIGHT PRESENT A POTENTIAL CONFLICT OF INTEREST? ☒ YES ☐ NO

HAVE YOU BEEN CONVICTED OF A FELONY OR MISDEMEANOR CRIME SINCE YOUR 18TH BIRTHDAY, EXCLUDING ARRESTS OR DETENTIONS THAT DID NOT RESULT IN A CONVICTION; CONVICTIONS THAT HAVE BEEN JUDICIALLY DISMISSED, EXPUNGED OR ORDERED SEALED; AND CERTAIN MARIJUANA RELATED CONVICTIONS THAT ARE OLDER THAN TWO YEARS, AS LISTED IN CALIFORNIA LABOR CODE § 432.8 (INCLUDING VIOLATIONS OF CALIFORNIA HEALTH AND SAFETY CODE SECTIONS 11357(B) AND (C), 11360(C) 11364, 11365 AND 11550 – AS THEY RELATE TO MARIJUANA)? ☐ YES ☒ NO

IF YES, PLEASE EXPLAIN AND ATTACH ADDITIONAL SHEETS, IF NECESSARY.

PLEASE BRIEFLY EXPLAIN WHY YOU WISH TO SERVE ON THIS BOARD, COMMITTEE, OR COMMISSION. ATTACH ADDITIONAL SHEETS, IF NECESSARY.

I'd like to expand and continue my advocacy for senior issues and programs . I can use my 25 years of financial services experience to better the Orange County senior community

DATE: 7/20/2022

APPLICANTS SIGNATURE: Rachel Owens

CLERK OF THE BOARD OF SUPERVISORS USE ONLY – DO NOT WRITE BELOW THIS LINE

Date Received: _____ Received by: _____
Deputy Clerk of the Board of Supervisors
Date referred: _____
To: ☐ BOS District 1 ☐ BOS District 2 ☐ BOS District 3 ☐ BOS District 4 ☐ BOS District 5
☐ All BOS ☐ BCC Contact Person Name _____



Rachel Owens **Financial Advisor**

Rachel has devoted herself to assisting women-owned and family owned businesses grow and pass-on their companies. As a founding member and past-President of NAWBO-OC, she helps women business owners grow their businesses. She helped found the Family Business Council at Cal Sate Fullerton as well as Succession Strategies, Inc. She has demonstrated her commitment to family-owned businesses by completing the Certified Family Business Advisor designation.

With over 25 years of experience in financial services, Rachel has a wealth of knowledge that gives her a unique perspective when working with our clients. She possesses additional expertise in real estate that she incorporates into her financial planning advice. Her financial planning practice focuses on helping family owned business owners develop the financial independence and estate plans* necessary to create a smooth business succession.

Background:

- Remarkable Woman Lifetime Achievement- NAWBO,2020
- Board Member, Severing People in Need ,2010
- Board member, Irvine City Senior Council ,2008
- Co-founded Tri-Circle Financial Group, 2003
- Co-founded Succession Strategies to consult with family businesses, 2001
- Small Business Administration Women Business Advocate, 2000
- Certified Family Business Specialist, American Business College, 1997
- National Organization of Women Business Owners – Orange County (NAWBO-OC) Member of the Year, 1995 & 1996
- Founding sponsor Family Business Council California State University, Fullerton, 1994
- Founding-member NAWBO-OC Chapter, 1990
- Bachelor of Arts degree – University of California, Irvine, 1974

Licenses:

- Investment Advisor Representative of LPL Financial Services
- Series 7 NASD Registration (General Securities Representative)
- Series 22 NASD Registration (Direct Participation Programs Limited Representative)
- Life, Health, Disability Income Insurance Licensed (California Insurance License #0714190)