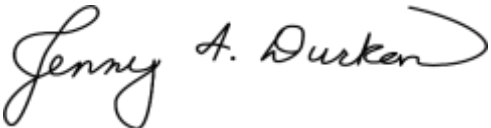




City of Seattle Boards & Commissions Notice of Appointment

Appointee Name: <i>Jack O'Connor</i>		
Board/Commission Name: <i>Historic Seattle Preservation & Development Authority</i>		Position Title: <i>Member</i>
<input checked="" type="checkbox"/> Appointment OR <input type="checkbox"/> Reappointment	City Council Confirmation required? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Appointing Authority: <input type="checkbox"/> City Council <input checked="" type="checkbox"/> Mayor <input type="checkbox"/> Other: <i>Fill in appointing authority</i>	Term of Position: * 12/1/2019 to 11/30/2023 <input type="checkbox"/> <i>Serving remaining term of a vacant position</i>	
Residential Neighborhood: <i>Jack O'Connor</i>	Zip Code: <i>98144</i>	Contact Phone No.: [REDACTED]
Background: Jack O'Connor is a Certified Financial Planner and a Senior Wealth Strategy Associate at UBS. He attended the Yale School of Management and has a BS in Finance from Portland State University. His financial expertise will benefit the Historic Seattle Council, filling a current gap in governing council member skill sets.		
Authorizing Signature (original signature):  Date Signed (appointed): 9.29.20	Appointing Signatory: <i>Jenny A. Durkan</i> <i>Mayor of Seattle</i>	

*Term begin and end date is fixed and tied to the position and not the appointment date.

JACK O'CONNOR, CFP[®], CIMA[®]

EXPERIENCE

UBS

Senior Wealth Strategy Associate

Seattle, WA
February 2016 - Present

Client relationship, financial plan development and delivery. Experienced with donor-advised funds, estate & tax planning, family, educational and environmental foundations.

Active portfolio management including exclusionary, integrated and impact investment screens. CSRHub, Morningstar, and MSCI. Equity valuation, trading, tax-loss harvesting, and asset allocation.

Institutional Consulting for conservation endowment funds established for national parks globally. Developing asset allocation, IPS, forecasting risk metrics using quantitative modeling, performance monitoring, manager research and implementing ESG mandates across portfolios.

Northwestern Mutual Financial Network

Director of Investment Operations

Portland, OR
December 2013 – February 2016

Client discovery, account opening, transfers and client investment performance reporting.

Financial planning software, student loan consolidation and risk mitigation.

Development and implementation of processes designed for streamlining client onboarding and asset transfer, resulting in a growth of AUM of 300% in three years.

American Red Cross Finance Department

Business Planning Analyst Intern

Portland, OR
April 2012 – June 2013

Biomedical Finance Business Planning Internship analyzing data metrics for the Western Division of the American Red Cross' operations.

Developed skills in Microsoft Access and Excel to deliver monthly, division-wide Sales and Operations Planning presentations to five regional CEOs and Western DVP.

Creating data tables and charts for each region's biomedical collections and distributions operations for the prior month's cycle and budgeting and fiscal year forecasts.

LICENSES & CREDENTIALS

General Securities Representative Exam (Series 7)

April 2015

Uniform Combined State Law Exam (Series 66)

June 2015

CERTIFIED FINANCIAL PLANNER[™]

November 2017

Certified Investment Management Analyst[®]

May 2018

EDUCATION

Yale School of Management

May 2018

Investment Management Theory and Practice

CIMA® Certification Program - curriculum focus on Ethics, Fundamentals, Traditional and Alternative Investments, Portfolio Theory and Behavioral Finance, Performance Measurement and Attribution, Risk and Return and Portfolio Construction and Consulting Process,

Portland State University School of Business Administration

March 2014

B.S. Finance

Senior Strategist: Financial Management Association

Co-creator/Coordinator of First Annual Northwest Finance Career Fair

Excellence in Economics award recipient

Historic Seattle Preservation and Development Authority

12 Members: Pursuant to RCW 35.21.730 and SMC 3.110, all members subject to City Council confirmation, 4-year terms:

- 4 Mayor- appointed
- 8 Other Appointing Authority: 4- PDA Governing Council, 4- PDA Constituency

Roster:

*D	**G	RD	Position No.	Position Title	Name	Term Begin Date	Term End Date	Term #	Appointed By
6	M		1.	Chair	David Yeaworth	11/30/16	11/30/20	1	Constituency
6	F		2.	Member	Stephanie Smith Toothman	11/30/16	11/30/20	1	Mayor
6	F		3.	Member	Katheryn H. Krafft	12/1/18	11/30/22	3	Constituency
6	M		4.	Member	Vernon M. Abelsen	12/1/19	11/30/23	2	Governing Council
2	F		5.	Member	Krista Whitters	11/30/16	11/30/20	1	Mayor
6	F		6.	Treasurer	Connie Walker-Gray	12/1/17	11/30/21	2	Constituency
6	M		7.	Member	Michael Powe	11/30/16	11/30/20	6	Governing Council
6	F		8.	Member	Mary McCumber	12/1/18	11/30/22	6	Governing Council
6	M		9.	Member	Pete Mills	12/1/17	11/30/21	6	Governing Council
1	F		10.	Member	Valerie Tran	12/1/19	11/30/23	2	Mayor
6	M		11.	Secretary	Rick Sever	12/1/19	11/30/23	5	Constituency
6	M		12.	Member	Jack O'Connor	12/1/19	11/30/23	1	Mayor

SELF-IDENTIFIED DIVERSITY CHART

	SELF-IDENTIFIED DIVERSITY CHART				(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
	Male	Female	Transgender	NB/ O/ U	Asian	Black/ African American	Hispanic/ Latino	American Indian/ Alaska Native	Other	Caucasian/ Non-Hispanic	Pacific Islander	Middle Eastern	Multiracial
Mayor	1	3			1	1				2			
Council													
Other	5	3								8			
Total	6	6			1	1				10			

Key:

- *D List the corresponding *Diversity Chart* number (1 through 9)
 - **G List *gender*, **M**= Male, **F**= Female, **T**= Transgender, **NB**= Non-Binary, **O**= Other, **U**= Unknown
 - RD Residential Council District number 1 through 7 or N/A
- Diversity information is self-identified and is voluntary.*