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CITY OF OAKLAND



CITY HALL • 1 FRANK H. OGAWA PLAZA, 3rd FLOOR • OAKLAND, CALIFORNIA 94612

Office of the Mayor
Honorable Libby Schaaf
Mayor

(510) 238-3141
Fax (510) 238-4731

Letter of Appointment

August 2, 2021

The Honorable City Council
One Frank H. Ogawa Plaza, Second Floor
Oakland, CA 94612

Dear President Bas and members of the City Council:

Pursuant to City Charter Section 601, the Mayor has reappointed the following persons as members of the following board or commission, subject to City Council confirmation:

Oakland Police and Fire Retirement Board

R. Steven Wilkinson is appointed to the Oakland Police and Fire Retirement Board as Insurance Representative to serve a term beginning September 1, 2021 and ending August 31, 2026, filling the seat previously held by himself.

Thank you for your assistance in this matter.

Sincerely,

A handwritten signature in cursive script, appearing to read "Libby Schaaf".

Libby Schaaf
Mayor

Profile

R. Steven _____ Wilkinson _____
First Name Middle Initial Last Name

_____.com
Email Address

Street Address Suite 252
Suite or Apt

Oakland _____ CA _____ 94612
City State Postal Code

Business: (510) _____ Mobile: (510) _____
Primary Phone Alternate Phone

Wilkinson Wealth Management _____ President _____
Employer Job Title

Which Boards would you like to apply for?

Police and Fire Retirement Board: Submitted

Interests & Experiences

Please tell us how your qualifications and participation will relate to the requested board and/or commission's mission.

I am currently a trustee of the Oakland Police and Fire Retirement system; appointed in 2012 and reappointed by Mayor Libby Schaaf in 2016 and wish to continue my seat with further appointment. I also serve on the Investment and Audit Committees. I am a Harvard MBA, a Registered Representative, an Investment Advisory Representative, and a licensed insurance agent. I am a member of The Court of the Table, an elite group of professionals recognized by the financial services industry organization Million Dollar Round Table (MDRT). MDRT recognizes members who demonstrate exceptional professional knowledge, strict ethical conduct, and outstanding client service. I am Chairman of the Board of Directors of the Northern California Small Business Financial Development Corporation (State of California Investment Bank).

Please submit your resume or curriculum vitae. You may upload a document. (A Word format is preferred.) Alternatively, you may paste the text of your resume in the field provided below.

Steven Wilkinson Bio 06.2021 .pdf
Upload a Resume

Please paste the text of your resume or curriculum vitae below.

R. Steven Wilkinson, MBA Mr. Wilkinson is a Harvard MBA, a Registered Representative, an Investment Advisory Representative, and a licensed insurance agent. He began his financial career as a FDIC bank Examiner. He later joined Smith Barney, Morgan Stanley. Steven is a member of The Court of the Table, an elite group of professionals recognized by the financial services industry organization Million Dollar Round Table (MDRT). MDRT recognizes members who demonstrate exceptional professional knowledge, strict ethical conduct, and outstanding client service. Mr. Wilkinson obtained a degree in finance from Kelley School of Business Indiana University and an MBA from Harvard Business School. He is Chairman of the Board of Directors of the Northern California Small Business Financial Development Corporation (State of California Investment Bank). He is a trustee of the Oakland Police and Fire Retirement system; appointed in 2012 and reappointed by Mayor Libby Schaaf in 2016. He serves on the Investment and Audit Committees. Mr. Wilkinson is former Board Member of Inner City Advisors (ICA Fund Good Jobs) and Former President of the Board of the only Professional Theatre in Oakland's History; The Oakland Ensemble Theater. Mr. Wilkinson is originally from Nashville, Tennessee.

Please click the acknowledgement below.

Service on City of Oakland boards, commissions, and committees may require filings of the FPPC's Statements of Economic Interest (Form 700). Upon appointment and determination of filing status, I will comply with all filing obligations.

I Agree *

R. Steven Wilkinson, MBA

Mr. Wilkinson is a Harvard MBA, a Registered Representative, an Investment Advisory Representative, and a licensed insurance agent. He began his financial career as a FDIC bank Examiner. He later joined Smith Barney, Morgan Stanley. Steven is a member of The Court of the Table, an elite group of professionals recognized by the financial services industry organization Million Dollar Round Table (MDRT). MDRT recognizes members who demonstrate exceptional professional knowledge, strict ethical conduct, and outstanding client service.

Mr. Wilkinson obtained a degree in finance from Kelley School of Business Indiana University and an MBA from Harvard Business School. He is Chairman of the Board of Directors of the Northern California Small Business Financial Development Corporation (State of California Investment Bank). He is a trustee of the Oakland Police and Fire Retirement system; appointed in 2012 and reappointed by Mayor Libby Schaaf in 2016. He serves on the Investment and Audit Committees.

Mr. Wilkinson is former Board Member of Inner City Advisors (ICA Fund Good Jobs) and Former President of the Board of the only Professional Theatre in Oakland's History; The Oakland Ensemble Theater. Mr. Wilkinson is originally from Nashville, Tennessee.



FILED
OFFICE OF THE CITY CLERK
OAKLAND

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Approved as to Form and Legality

Dee J. Fogel
City Attorney's Office

OAKLAND CITY COUNCIL

RESOLUTION NO. _____ C.M.S.

INTRODUCED BY MAYOR LIBBY SCHAAF

A RESOLUTION APPROVING THE MAYOR'S REAPPOINTMENT OF R. STEVEN WILKINSON AS A MEMBER OF THE OAKLAND POLICE AND FIRE RETIREMENT BOARD

WHEREAS, section 601 of the Oakland City Charter provides that members of City boards and commissions shall be appointed by the Mayor subject to confirmation by the affirmative vote of five members of the City Council; and

WHEREAS, Section 2601 of the City Charter provides that the Police and Fire Retirement System shall be managed and administered by a Police and Fire Retirement Board; and

WHEREAS, the Honorable Mayor Libby Schaaf, upon the recommendation of the corresponding councilmembers, reappoints **R. Steven Wilkinson** to the Oakland Police and Fire Retirement Board for the terms stated below; now therefore be it

RESOLVED: that pursuant to City Charter section 601, the City Council hereby confirms the Mayor's appointment as follows:

R. Steven Wilkinson is appointed to the Oakland Police and Fire Retirement Board as Insurance Representative to serve a term beginning September 1, 2021 and ending August 31, 2026, retaining the seat he currently holds.

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IN COUNCIL, OAKLAND, CALIFORNIA,

PASSED BY THE FOLLOWING VOTE:

AYES – FIFE, GALLO, KALB, KAPLAN, REID, TAYLOR, THAO AND PRESIDENT FORTUNATO BAS

NOES –

ABSENT –

ABSTENTION –

ATTEST: _____

ASHA REED
City Clerk and Clerk of the Council of the City
of Oakland, California