

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

October 22, 2020

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

Dear President Kaplan 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:

Budget Advisory Commission

John McKenna to serve the remainder of the three-year term beginning October 1, 2019 and ending September 30, 2022, filling the seat vacated by Travis George.

Thank you for your assistance in this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Libby Schaaf".

Libby Schaaf
Mayor

Profile

John _____ F _____ McKenna _____
First Name Middle Initial Last Name

Email Address

Street Address _____ Suite or Apt _____
 Oakland _____ CA _____ 94611 _____
City State Postal Code

Home: _____ Business: _____
Primary Phone Alternate Phone

Embarcadero Financial Group _____ Partner _____
Employer Job Title

Which Boards would you like to apply for?

Budget Advisory Commission: Submitted
 Public Ethics Commission: Submitted
 Affordable Housing & Infrastructure Bond Public Oversight Committee : Submitted

Interests & Experiences

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

I am an Oakland resident eager to make a difference. I want to help the City in a challenging environment. My background in financial management and advisory services would be valuable to the The Affordable Housing & I-Bond Public Oversight Committee. I have held positions in both business operations, corporate finance and financial advisory services. My education includes an MBA from UC Berkeley with a focus on Finance. I have experience reading, understanding and the review of financial and operational reports. Measure KK proceeds are vital to Oakland. KK needs to be subject to proper accounting along with a review of its real impact. Members of the committee need to keep stated goals of the measure in mind when evaluating expenditures. Effective use of the funds can improve social equity, anti-displacement and access affordable housing for the City of Oakland. I hope to help the committee in that endeavor.

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.

McKenna.resume.190908.pdf
Upload a Resume

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

JOHN F. McKENNA

CA 94611

EXPERIENCE EMBARCADERO FINANCIAL GROUP (San Francisco, CA) 2013 to Present Wealth Advisor & Chief Operations Manager, Principal Moved to Independent RIA Act with fiduciary duty to individuals, executives and companies to develop financial plans and strategies. Help clients execute their plans and strategies. Co-investment manager for the firm's Registered Investment Advisor (RIA). MORGAN STANLEY SMITH BARNEY (Palo Alto, CA & San Francisco, CA) 2008 to 2013 Registered Associate & Project Coordinator Recruited to Top Producing Team at Firm Hired by former Citi Smith Barney as a San Francisco based Financial Advisor. Used prior experience to deliver "Personal CFO" process for advanced planning & investment consulting. Recruited to Top Producing Team in Palo Alto. Managed implementation of the Palo Alto Group Corporate Services team's contract with a Fortune 100 client that offered financial planning to their top 1,500 executives. GREENSPOT, INC. (Carbondale, CO) 2007 to 2008 CFO & Principal Ground up concept, strategy, planning, and execution of corporation to sell "green" building materials in Colorado and beyond. POWERCRANKS, INC. (Walnut Creek, CA) 2005 to 2006 COO & CFO Helped restructure a firm that sold a sports and rehabilitation device. Facilitated sales growth, budget creation, e-commerce update, valuation methods and preparation for solicitation and receipt of outside funding. LOMBARD GROUP, INC. (Emeryville, CA) 1993 to 2005 President & CFO Founded and grew profitable export business selling goods primarily into the Mexican market. Investigated, qualified and decided which domestic & international firms to use as suppliers and clients. Managed American/Mexican owned company with offices in Emeryville, Denver & Mexico City. BRIDGE INTERNATIONAL COMPANY (San Francisco, CA) 1988 to 1993 Food Department Manager Generated revenues of imports / exports in the Food Department. GEORGETOWN UNIVERSITY PROGRAM IN PERU (Chimbote, Peru) 1986 to 1987 "Asesor" Liaison between the Diocese of Chimbote and Cerro Blanco Proyecto de Desagüe; EDUCATION UNIVERSITY OF CALIFORNIA, BERKELEY, Haas School of Business, Berkeley, CA. 1998 MBA. Accounting (Financial & Cost), Finance, Competitive Strategy & Investments concentrations. GEORGETOWN UNIVERSITY, School of Foreign Service, Washington, D.C. 1986 BSFS. Comparative & Regional Studies in International Affairs specializing in Africa. Crew. UNIVERSIDAD CATÓLICA, Quito, Ecuador, South America. 1986 Georgetown University accredited intensive Spanish language courses. L'UNIVERSITÉ DE DAKAR, Dakar, Sénégal, West Africa. 1984 to 1985 Year abroad at francophone La Faculté des Lettres et Sciences Humaines. ASSOCIATIONS & INTERESTS Language fluency Spanish: Excellent / Good French: Good / Fair Judge (2016), Alameda County Registrar of Voters Inspector (2018), Bilingual, Alameda County Registrar of Voters Kensington Improvement Club – Past President, Board of Directors Skytown Preschool, Past Vice President of Board of Directors California Council for International Trade – Former Board Director

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 *

JOHN F. McKENNA

EXPERIENCE

EMBARCADERO FINANCIAL GROUP (San Francisco, CA) 2013 to Present
Wealth Advisor & Chief Operations Manager, Principal Moved to Independent RIA
Act with fiduciary duty to individuals, executives and companies to develop financial plans and strategies. Help clients execute their plans and strategies. Co-investment manager for the firm's Registered Investment Advisor (RIA).

MORGAN STANLEY SMITH BARNEY (Palo Alto, CA & San Francisco, CA) 2008 to 2013
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EDUCATION

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GEORGETOWN UNIVERSITY, School of Foreign Service, Washington, D.C. 1986
BSFS. Comparative & Regional Studies in International Affairs specializing in Africa. Crew.

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Georgetown University accredited intensive Spanish language courses.

L'UNIVERSITÉ DE DAKAR, Dakar, Sénégal, West Africa. 1984 to 1985
Year abroad at francophone La Faculté des Lettres et Sciences Humaines.

ASSOCIATIONS & INTERESTS

- ◆ Language fluency
 - Spanish: Excellent / Good
 - French: Good / Fair
- ◆ Judge (2016), Alameda County Registrar of Voters
Inspector (2018), Bilingual, Alameda County Registrar of Voters
- ◆ Kensington Improvement Club – Past President, Board of Directors
- ◆ Skytown Preschool, Past Vice President of Board of Directors
- ◆ California Council for International Trade – Former Board Director


City Attorney's Office

OAKLAND CITY COUNCIL

RESOLUTION NO. _____ C.M.S.

INTRODUCED BY MAYOR LIBBY SCHAAF

RESOLUTION CONFIRMING THE MAYOR'S APPOINTMENT OF JOHN MCKENNA TO THE BUDGET ADVISORY COMMISSION

WHEREAS, Section 601 of the 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, Ordinance No. 13337 C.M.S, adopted November 3, 2015, creates the Budget Advisory Commission to advise the Mayor and City Council on topics deemed important to the fiscal health of the City, encourage public participation and input into fiscal decision making, and improve the transparency and accountability of City fiscal information and decision making; and

WHEREAS, the Budget Advisory Commission shall be composed of 15 members appointed by the Mayor and confirmed by the Council in accordance with Section 601 of the City Charter; and

WHEREAS, three members are selected by the Mayor, two members are recommended by the Chairperson of the Finance and Management Committee, one member is recommended by each Councilmember, one member is recommended by the City Auditor, and one member is recommended by the Chairperson of the Community Economic and Workforce Development Committee; and

WHEREAS, the Honorable Mayor Libby Schaaf, upon the recommendation of the corresponding councilmembers, appoints **John McKenna** now therefore be it

RESOLVED: That pursuant to City Charter section 601, the City Council hereby confirms the Mayor's appointment of:

John McKenna to serve the remainder of the three-year term beginning October 1, 2019 and ending September 30, 2022, filling the seat vacated by Travis George.

2988483v1

IN COUNCIL, OAKLAND, CALIFORNIA,

PASSED BY THE FOLLOWING VOTE:

AYES - FORTUNATO BAS, GALLO, GIBSON MCELHANEY, KALB, REID, TAYLOR, THAO
AND PRESIDENT KAPLAN

NOES -

ABSENT -

ABSTENTION -

ATTEST: _____
ASHA REED
Acting City Clerk and Clerk of the Council
of the City of Oakland, California