

*Town of San Anselmo
Council Meeting*

September 9, 2014

Interview Schedule

<u>Time</u>	<u>Applicant</u>	<u>Committee</u>
6:50 p.m.	Marcy Kalat	Library Parcel Tax Oversight

**TOWN OF SAN ANSELMO
BOARDS/COMMITTEES/COMMISSIONS
STATUS REPORT
As of 08/28/14**

Board, Committee, Commission (total seats)	Seats Expiring/ Vacant	Applicants	Term (Yrs)¹	Date Interviewed
Arts Commission 9 seats + 1 youth <u>Dave Donery</u> (Temporary Expansion to 10 seats)	3	Elizabeth Romanoff	3	
Board of Review 5 seats <u>Daria Carrillo</u>	1		6	
Capital Programs Monitoring Committee 7 seats <u>Sean Condry</u>	2	Katie Rice Jones	4	
Economic Development Committee 7 seats <u>Dave Donery</u> <u>Diane Henderson</u> (Temporary Expansion to 8 seats)			3	
Flood Committee 5 seats <u>Sean Condry</u>			4	
Historical Commission 11 seats+ 1 youth <u>Linda Kenton</u>			4	
Library Advisory Board 7 seats+ 1 youth <u>Linda Kenton</u> (Temporary Expansion to 8 seats)			4	
Library Tax Oversight Committee 5 seats <u>Linda Kenton</u>	3	Sheila Girton */** Marcy Kalat** Ted Freeman */**	3	09/23/2014 09/09/2014 09/23/2014
Marin Commission On Aging 1 seat			3	
Marin County Hazardous & Solid Waste Authority 1 seat			3	
Mosquito Abatement District 1 seat			2-4	
Open Space Committee 11 seats + 1 youth <u>Diane Henderson</u>	1		4	
Parks & Recreation Commission 7 seats + 1 youth <u>Dave Donery</u>	1	Annabelle Reber**	4	08/12/2014
Planning Commission 7 seats <u>Diane Henderson</u>			4	
Quality of Life 9 seats+ 1 youth <u>Phil Boyle</u>	2		3	
Ross Valley Paramedic Authority 1 seat <u>Roger Meagor</u>			4	
Tax Equity Board 3 seats <u>Daria Carrillo</u>	1	Jay Weill*/**	3	08/12/2014

* Incumbent ** Interview has been scheduled

TOWN OF SAN ANSELMO

525 San Anselmo Ave, San Anselmo, CA 94960

APPLICATION FOR APPOINTMENT TO A SAN ANSELMO BOARD/COMMISSION/COMMITTEE

To: San Anselmo Town Council

Date: 8-8-14

I wish to apply for an appointment to a term/balance of term of the

Library Parcel Tax Oversight Committee

Incumbent

New Member

Name: Marcy Kalat

Home Address: 22 Tamalpais Ave #10

Occupation: Sales Director

Employer's Address: 12 Palmetto Rd
Londonderry NH 03053

Home Phone: 415-846-5725 Work Phone: 510-562-2258 Fax: _____

E-Mail: marcykalat@gmail.com

Number of Years as a resident of San Anselmo: 1

In Marin: 14

Education Level Achieved:

- Graduate Degree (Major: _____)
- College or University Degree (Major: _____)
- Some College
- High School Diploma
- Other (Explain: _____)

Names and phone numbers of San Anselmo residents who can be contacted for referral information about me:

1. Stacy Chern 415-717-6216
2. Jim Hughes 415-457-0473
3. Jeri Cohen 415-871-5796

YES **NO**

_____	I would be able to regularly attend the meetings of this Board/Commission/Committee.	<input checked="" type="checkbox"/>	_____
_____	I would be available to attend additional meetings when they are necessary.	<input checked="" type="checkbox"/>	_____
_____	I am familiar with the responsibilities and functions of this Board/Commission/Committee.	<input checked="" type="checkbox"/>	_____
_____	I have attended meetings of the Board/Commission/Committee as a member of the public.	_____	<input checked="" type="checkbox"/>

List briefly, previous experience serving in public office, and/or on civic commissions, boards, or committees:

I have been a volunteer thru National Charity League for various Mason Organizations. I also served on the foundation for Gilwood School as VP of Solicitation raising over 10,000 for the elementary school.

Reasons for this appointment:

I would like to be more involved in my community & I feel library services are important to a community.

What are your qualifications for this appointment:

I am a good responsible fiscal citizen? I care about the library? US Services.
Treasurer for National Charity League

Briefly, what do you consider to be the most important, one or two current issues facing this Board/Commission/Committee?

To serve as a good liaison between the public & the library. To communicate to the public issues regarding the library & its services. To make sure tax money spent wisely

I understand that I, and all other applicants, will be personally interviewed by the Town Council as part of the selection process for this appointment.

Marcy Kalcut

Signature

8-8-14

Date

Other Boards, Commissions, or Committees on which you would be interested in serving if not appointed to this seat?

any

Do you wish to be considered again if you are not selected for this appointment? Yes No

(You may attach personal resumes or other information which you believe would be helpful to the Council in its selection process.)

Thank you for your interest in serving the Town of San Anselmo and its citizens.
For further information, please contact Jeannie Courteau, Administrative Services Assistant I at (415)258-4591.

Marcy A. Kalat

22 Tamalpais Ave.
San Anselmo, CA 94960

415-846-5725 • marcykalat@gmail.com

<http://www.linkedin.com/pub/marcy-kalat/0/b96/762>

Professional Profile

- Results-oriented professional with measurable experience leading **strategic and tactical initiatives** designed to **close sales** and **retain customers**.
- Significant experience in account relations and enterprise sales of top-tier accounts such as **Merrill Lynch, Fidelity Investments and Smith Barney**.
- **Demonstrated track record** of understanding and meeting client needs and providing exceptional account management.
- Analytical problem-solver, able to anticipate issues and create new systems that **streamline operations** and **improve efficiency**.

Professional Experience

Regulatory Compliance

Sales Director

October 2013-present

San Francisco, CA

- Consultative sales of regulatory compliance solutions to C-level executives at major and regional banks, broker-dealers, & private fund companies.
- Registration and ongoing consultation of new firms with FINRA & the SEC.
- Develop account plan & maintain accurate pipeline forecast.
- Developed strategic partnership & alliances with accounting & law firms.
- Organized & lead quarterly compliance meetings with Bay area CCO's founded and chair the group with over 80 members in partnership with National Society of Compliance Professionals.
- Developed proposals for Broker-Dealer, IA's & Private & Hedge Fund companies consisting of SEC registration, mock audits, AML requirements & ongoing compliance engagements.
- Responsible for hunting & developing own leads through networking, research and referrals.

StoneRiver, Inc. (2 positions)

Enterprise Account Executive

March 2013-October 2013

Raleigh, NC

- Responsible for hunting all new business for regulatory compliance software solutions to the insurance industry consisting of regulatory intelligence with a closed-loop compliance workflow and process manager to help effectively manage regulatory risk & consultative sales of online compliance solutions to upper-level management within the financial services industry, including major and regional banks, broker-dealers and investment advisors.
- Responsible for national sales territory consisting of enterprise accounts.
- Responded to RFP's and created & delivered sales presentations and demos in person and via WebEx to C-level executives.
- Maintain relationship development within all levels of financial services industry compliance professionals to cross sell additional company products.
- Required to understand prospects business & technical requirements for successful implementation.
- Actively used and proficient in Salesforce.com to track all account & lead activity to effectively manage pipeline and close business.

- Acquired Lincoln Financial, Protective Life Insurance, & Nationwide Insurance in first year totaling over 1 million in revenue.
- Grown FIRM Element Continuing Education client base by over 100%.
- Educated company on Financial Services CE market & Industry "hot topics"
- Advised in the creation of an updated CE catalog.
- Strategized & Implemented new client services process & procedures.
- Created & implemented partnership agreement to offer FINRA Exam Prep & Insurance Pre-licensing in Quest product suite.
- Successfully integrated priorities between sales, product development, and client requirements to aid in the development and rollout of two new product lines to existing and new customer base.
- Provided strategy for proposal development, RFP responses, tradeshow, collateral, corporate website and email communications, product demos, presentations, customized client user guides and other acquisition and retention tools.

StoneRiver, Inc.

Senior Vice President Sales

January 2008-January 2009

Raleigh, NC

- See above description rehired back at this company in 2013.

FIRE Solutions Inc.

Vice President Sales

April 2002-December 2007

San Francisco, CA

- Leading financial services company sold compliance technology solutions & FINRA licensing exam prep courses to financial institutions. Client base includes broker-dealers, banks & insurance companies.
- Developed and implemented firm's sales strategy.
- Direct Report to CEO & Board of Directors.
- Increased client base over 400% across company.
- Achieved personal sales goal of 140% over quota.
- Achieved 50% new sales growth year over year across company.
- Administered rollout of two new product lines.
- Created a new product line that was first to market with now over 15 competitors.
- Closed major deals with Merrill Lynch, Smith Barney, John Hancock, Prudential, Wachovia and others.
- Managed client services staff to insure client and revenue retention and increase organic growth.
- Conducted industry-specific training to non-industry personnel to instill deeper understanding of client requirements, industry rules & regulations.
- Managed sales staff & created account plans & company sales strategy.

Education

Indiana University

B.A. Social & Behavioral Science

Minors in Business & Sociology

Bloomington, IN

Professional Affiliations

- National Society of Compliance Professionals
- Chair San Francisco NSCP Roundtable Group
- Securities Industry & Financial Markets Association

Personal Affiliations

- National Charity League

References available upon request.