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CITY OF NAPA

Appointments to Outside Agency
Commissions, Committees & Boards
APPLICATION B

out of city
CITY OF NAPA
CITY CLERK

2013 DEC 16 AM 9:51



COUNTY OF NAPA
EXECUTIVE OFFICE

This application for appointment is kept on file for 2 years
and is a public document open for inspection and reproduction.

The function of Commissions, Committees and Boards is to make decisions and/or policy recommendations to the City Council, and to speak on behalf of Napa residents in relation to outside agency Commissions, Committees and Boards. Applications will be kept on file annually for submission to the City Council when vacancies occur.

I wish to be considered for appointment to the following Commission, Committee or Board:

(PLEASE CHECK ONLY ONE)

- ☐ Napa City/County Library Commission
☐ Napa County Arts & Culture Commission
☐ Napa County Mosquito Abatement District Board
☐ Napa Public Access Cable TV Board
☐ Napa Sanitation District Board
☒ Other: CIVIL SERVICE COMMISSION
+ NAPA COUNTY MEASURE A FINANCIAL OVERSIGHT COMMITTEE

(Please Print)

DATE: 12/16/2013

NAME: JEFFREY M. FRYER, CPA-CGMA

ADDRESS: [REDACTED]

ZIP: 94558-1559

HOME PHONE: [REDACTED]

FAX PHONE: NA

E-MAIL: [REDACTED]

LENGTH OF RESIDENCE IN NAPA: 1 YR 1 Mo

REGISTERED TO VOTE IN THE CITY OF NAPA? YES

OCCUPATION/EMPLOYER: NOT CURRENTLY

WORKING

COMMUNITY SERVICE EXPERIENCE:

Organization	Dates Served	Position
AJF DENVER CO	2009-2012	MEMBER FINANCIAL OVERSIGHT GRANT
TEMPLE BETH AM	2010-2012	MEMBER INVESTMENT COMMITTEE
ROSE COMMUNITY FOUNDATION	2009-2012	ADVISORY SERVICES TO BOARD
OAKWOOD SCHOOL	1983-1989	CHAIR FINANCE COMMITTEE + BOARD MEMBER

EDUCATION:

School	Major	Graduation Date / Degree
UNIV OF SO CAL	BUSINESS-ACCOUNTING	6/71 BS

OTHER SPECIFIC OR RELEVANT EXPERIENCE OR EXPERTISE: AUDITOR TO CITY OF VENTURA

AUDITOR TO COUNTY OF VENTURA - 2 YEARS SPECIAL AUDITOR TO EPA

FOR LOS ANGELES WATER + WASTE WATER FACILITIES - SEE RESUME FOR
WORK EXPERIENCES

WHAT IS YOUR UNDERSTANDING OF THE ROLE AND RESPONSIBILITY OF THE COMMISSION/COMMITTEE/BOARD FOR WHICH YOU ARE APPLYING?

COUNTY-FOC IS SPELLED OUT ON WEBSITE AS TO FUNCTIONS & DUTIES

CIVIL SERVICE COMMISSION - ADMINISTRATIVE CAPACITY FOR CITY COUNCIL
ON ISSUES CONCERNING PERSONNEL ADMINISTRATION, CLASSIFIED SERVICE

WHAT ISSUES DO YOU BELIEVE ARE MOST IMPORTANT TO ADDRESS IN THE COMMISSION/COMMITTEE/BOARD? REGULATIONS + EMPLOYEE APPEALS

PROVIDE OBJECTIVE THINKING AND ADVICE THAT PROVIDES A

WIN/WIN APPROACH TO CONFLICT RESOLUTION AS WELL AS BEING PROACTIVE
TO REDUCE POTENTIAL CONFLICTS

WHAT PROGRAMS OR PROJECTS WOULD YOU LIKE TO SEE IMPROVED OR IMPLEMENTED AS RELATED TO THE COMMISSION/COMMITTEE/BOARD?

HAVING LIMITED EXPOSURE TO THE NAPA COMMUNITY WILL ALLOW ME TO
BRING A FRESH LOOK + APPROACH TO EVALUATION OF EXISTING + FUTURE
PROGRAMS

WHAT ACTIVITIES OF THIS COMMISSION/COMMITTEE/BOARD DO YOU EXPECT WILL BE MOST INTERESTING TO YOU?

HELPING SERVE OUR COMMUNITY TO BRING A POSITIVE APPROACH
TO ISSUES REQUIRING RESOLUTION + CREATIVE PROBLEM SOLVING

ARE YOU INVOLVED IN ANY ORGANIZATIONS OR ACTIVITIES THAT MAY RESULT IN A CONFLICT OF INTEREST IF YOU ARE APPOINTED TO THIS COMMISSION/COMMITTEE/BOARD?

NONE

PLEASE LIST TWO LOCAL REFERENCES AND THEIR PHONE NUMBERS:

TERRY SCOTT

MARK LESTI

How did you learn of this vacancy?



Newspaper



Flyer



Internet



Other

(Appointees will be required to take an Oath of Office and are subject to filing a Statement of Economic Interests.)

Return to: City Clerk Department
PO Box 660
955 School Street
Napa CA 94559

DATE:

12/16/2016

SIGNATURE:

[Signature]

Jeffrey M. Fryer, CPA-CGMA

• Napa, CA 94558-1559

SENIOR TRUSTED BUSINESS AND FINANCIAL ADVISOR

Expert in growing and leading expansion for closely held enterprises &
Not-for-Profit Entities

Specialist in all aspects of commercial & residential real estate projects
Trusted Advisor & Fiduciary to Individuals, Families, Trusts or Estates

EXPERIENCE

Bernstein Global Wealth Management

2008-2012

(NYSE Master Limited Partnership with Assets Under Management in excess of \$400B.)

Vice President –Financial Advisor

- **Provide Financial Advisory and Asset Allocation Planning to High Net Worth Individuals, Corporate Retirement Plans, Foundations and Not for Profit Entities. Responsibilities:**
 - Build and maintain Trusted Advisor Relationships with clients and referral sources.
 - Supervise staff for presentation materials to clients and prospective client.
 - Network within business community including professional organizations, community organizations, met with high net worth individuals on a regular basis.
 - Create and execute presentations to prospective clients.
- **Accomplishments**
 - Built and oversaw client base in excess of \$70MM.
 - Recognized as one of the top Financial Advisors in Denver in 2011 & 2012 by *5280 Magazine*.
 - Established close working relationships with key members of the business communities of Denver, San Francisco, Los Angeles, New York and Tampa.
 - Expert in utilization of using Micro-Captive Insurance Companies for closely held family businesses.

Cosmi Corporation – Carson, CA

1995-2008

(Privately held leading developer and publisher of software for the home and office. #1 publisher in productivity software as tracked by NPD Techworld.)

President and Chief Financial Officer (CFO)

- **Member of senior executive management team responsible for building one of the largest privately held software companies in the United States**
- **Responsible for handling all financial areas of closely held-private computer software manufacturing and publishing business. Duties include:**
 - Negotiate all financing and critical contractual obligations.
 - Supervise all finance and information technology personnel on a daily basis.
 - Coordinate all board of directors planning, financial reporting and meeting agendas.
 - Oversee all financial reporting and budgeting on a monthly, quarterly and annual basis.
- **Accomplishments:**
 - Participated in expansion of corporate operations from single small business to multi national operation.
 - Centralized facilities and staff into newly built 100,000 sq. ft. complex in less than one year.
 - Completed successful upgrade of internal computer systems to SAP R/3.

Jeffrey M. Fryer & Company, Inc. – Los Angeles, CA

1987-1995

(Managing principal in the business management firm specialized in financial management for business and high net worth individuals in the Entertainment, Real Estate, and Estates & Trusts.)

Laventhol & Horvath – Los Angeles, CA

1982-1986

(9th Largest public accounting firm during this period)

Partner – Business Advisory Services

- **Responsible for a 40-member department, specializing in real estate partnerships operating residential and commercial projects, business planning, litigation support, estate planning, estate administration, and systems technology management.**
- **Represented a variety of national real estate syndication entities and developers.**
- **Auditor-Consultant City & County of Ventura**

Jeffrey M. Fryer, CPA-CGMA

• Napa, CA 94558-1559



EDUCATION

UNIVERSITY OF SOUTHERN CALIFORNIA

Adjunct Professor of Accounting 1974 - 1976

UNIVERSITY OF SOUTHERN CALIFORNIA

Bachelors Degree -- Business Administration (*Honors*) 1971

PROFESSIONAL LICENSES & ASSOCIATIONS

Licensed Certified Public Accountant in California

USC Accounting Circle – Lifetime Member

California Society of CPA's – Life Member

American Institute of CPA's – Life Member

Chartered Global Management Accountant "CGMA" – Charter Member

Series 7 & 66 Security Licenses, 2008-2012

PROFESSIONAL ORGANIZATIONS

International Wine & Food Society – Napa Branch

Napa Valley Grapegrowers Association

BOARD SERVICE

Financial Advisor to Rose Community Foundation

Financial Advisor to Big City Mountaineers

Financial Oversight Group Member – AJF of Denver

Investment Committee Member – Temple Emanuel - Denver

Board Member & Finance Chair – Oakwood School K-12

Board Member – Hathaway Home for Abused Women