Volunteer Opportunities

TOWN OF PARADISE VALLEY
COMMITTEE VOLUNTEER APPLICATION FORM

There is currently a vacancy on the Planning Commission and a vacancy on the Advisory Committee on Public Safety (ACOPS). The Planning Commission provides recommendations on a wide array of land-use issues; including: subdivision plats, lot splits, zoning ordinance amendments, special use permits, and general plan amendments. It is made up of seven members who serve three year terms. The Commission meets twice per month.

ACOPS assists the Police Department and Community Resource Officer in engaging the community in a public dialogue on issues relevant to public safety, including prevention, enforcement, awareness, and community/victim outreach. The Committee meets bi-monthly.
If you are interested in serving on either of these bodies, please complete this application and submit. The deadline to submit an application is January 8, 2017.

Please select committee(s) in which you are interested.* ☑ Planning Commission ☐ ACOPS

Please provide the following background information.

Name*	Michael Cummiskey
Address*	
Email*	
Home Phone	
Employer	Paradise Valley Wealth Management, Inc. (self)
Occupation	Financial Planner / Investment Adviser
Business Phone	
Cell Phone	
Number of years as PV resident	26

Professional experience highlights

Most of my career has been spent as an independent financial adviser here in Phoenix, and my office has been located in my P.V. home for the last 24 years. I was on the Board and ultimately President of the National Association of Insurance and Financial Advisors (NAIFA) of Phoenix in 1999-2000.

I';ve benefited from 20 years of world class corporate education and training with Jackson National Life and The Hartford';s independent broker-dealer. Whether acting as a team player, or leading a team of nearly 60 investment professionals, my people and business planning skills are thoughtful and authentic.

Now an entrepreneur since 2011, my brand, Paradise Valley Wealth Management, Inc., reflects the community in which I love to live and work. I am a comprehensive planner by choice. All the components for financial decision making have to be taken into consideration. Doing a single piece of the work may have negative impacts on the longer term results of the plan. I am both strategic in planning and tactical with details. These would be good traits for Planning Commission member. .

What experience do you think qualifies you to be a committee member?

I am a planner both professionally and personally. Weighing and then advising people on investment costs and opportunities, against the risks involved, is a large part of my profession. When I am planting new cacti or agaves in my yard, I have to think about density of the space,. the view corridors within the yard, how the plant should or shouldn';t display itself, etc. It';s a little nutty, but there is an attentions to detail that I enjoy,

As a long time resident, it has been exciting to live through the upgrades that has occurred throughout the Town, from under grounding our power lines and infrastructure improvements to the colored concrete sidewalks and ';Y'; at Tatum and McDonald. I have been attentive to the upgrades as they have occurred, without sacrificing the values of our community. In fact, to me, the Town just keeps getting better! It would be an honor to be a part of the Planning Commission to further the work done thus far.

My personal interests have long included strong interests in design and architecture (Frank Lloyd Wright in particular), desert landscaping and design (our yard was featured in Phoenix Home and Garden and included in their Garden Tour). I am a cactus collector (especially echinopsis hybrids). My sensitivity to aesthetic detail would be an asset to the Planning Commission.

Community Activities

Since 2014, I have been partnering with the Paradise Valley Police Department in hosting the semi-annual Shredathon. Our 10th shredding event is scheduled for March 31st, 2018. I do this as a little gift to my community (everyone can use some shredding!) and as a charitable fundraiser.

I approached the Town in 2013 about doing a shredding event as a ';give back'; to my community. I was advised to talk with Community Resource Office Kevin Albert, who was coincidentally considering doing a project around identity theft. Our first event was February 8th of 2014. I fund the expenses relating to the Event (Shredding services, printing flyers, advertising in the Independent, and donating 3 fireproof safes) and all monies raised go directly to ';Sirens and Sleigh bells" (formerly Shop with a Cop) to benefit local underprivileged kids on behalf of the PVPD. Our last event in November raised $2,217.00, and in total I would estimate the total amount raised has very easily exceeded $10,000.

Aside from the Shredding event, my wife and I belong to the Desert Botanical Garden and the McDowell Mountain Conservancy. I have been a patient volunteer with Hospice of the Valley since 2004. Our two daughters both attended Cherokee, Cocopah and Chaparral, and my wife Wendy is a first grade teacher at Cherokee.

* indicates required fields.

January 5, 2018

Town of Paradise Valley
Planning Committee
6401 East Lincoln Drive
Paradise Valley, AZ
85253

RE: Planning Committee volunteer application for Michael Cummiskey

Dear Planning Committee Members,

I've submitted the online application for the current opening in the Planning Committee. Hopefully you'll select me to serve with you and help advance the great things happening in the Town.

Please call my cell phone, , if you have any questions. Thank you all for the good work that you do.

Mike Cummiskey

Michael R. Cummiskey, CLU, ChFC, RICP

A strong choice for an executive team player in the financial services industry

Professional Experience:

3/11 – present ***Paradise Valley Wealth Management, Inc.***
Principal /Financial Planner

Overview: Create a comprehensive retail wealth management business utilizing my enthusiasm and years of experience, business contacts, knowledge and training of best practices in the financial service industry. Executed a four part business plan: 1) Invent a local brand in an affluent community offering a superior client experience, 2) Lead a team of 6 producing registered representatives, 3) Acquire and transition five books of securities business (500 accounts) and generate new authentic relationships and sales opportunities, 4) affinity marketing with a major independent property/casualty agency to their business-owner clients.

Skillset: Business branding with logo, website content, print ads, an identity brochure and hosting community events. Hired and trained employee to assist and help drive specific marketing strategies (technology initiatives, variable life insurance policy rescues, and expanding average assets per household). Develop a process of analysis and presentation to clients for account reallocations, and moving them when possible to a fee-based relationship using lower cost investments (ETFs and institutional-class funds). Suitable uses of mutual funds and variable annuities as needed.

Technologies: Website hosted by Emerald; Redtail CRM; Albridge Wealth Reporting (customized with logo, automated quarterly reports and client log-in capability); Morningstar Advisor Workstation (Research, Portfolio Comparison Proposals and Snapshots); Quik forms management, Pershing NetX360 trading platform with branded statements; Moneyguidepro.

8/94 – 3/11 ***The Hartford / Woodbury Financial Services, Inc.***
Regional Vice President

Overview: Generate sales with territory leadership, rep recruitment and supervision for Woodbury Financial (formerly Fortis Financial Group). Woodbury was voted Broker-Dealer of the Year in 2006, 2009 and 2011 by Investment Advisor magazine. Started scratch territory and built up to 48 independent registered reps in AZ, NM and Las Vegas. Work effectively from home office with 20% travel.

Skillset: Self-disciplined manager with territory producing in excess of $5.8M of gross commissions. Career-cycle relationship management with advisors: initial recruitment, licensing and assimilation; sales training on all products (life insurance, variable annuities, mutual funds, managed accounts, and alternatives).

Coaching and mentoring reps to execute their unique business models and create an excellent client experience. Coordinate with wholesalers in supporting rep events, territory profitability and managing expenses. Train on uses of technologies to leverage time, results and client contacts.

Lead joint sales calls with high net worth and business owner clients, focusing on Estate, Business and Tax Planning. Expertise includes uses of life insurance, deferred compensation planning, retirement plans, use of ILITs, and charitable giving.

Entrepreneurial recruiter. Targeted prospects and designed reply mailings; hired independent telemarketing and internet-based search firms to locate advisors with competing forms and RIAs.

Developed wholesaler network for rep referrals. Created FINRA-compliant print advertising. Well connected with the independent producer channel in AZ, NM and Las Vegas, NV.

Creative sales leadership using live seminars and webinars with advisors. Developed customized sales reports that measured producers' actual results against their stated goals. Initiated large-scale variable annuity and REIT sales meetings, demonstrating local leadership.

Compliance supervisor, conducted rep audits and identified suitability and advertising issues, with disciplinary actions and terminations if necessary. On-site support for reps during FINRA and State of AZ audits with no major deficiencies.

Achievements: Conference Qualifier. Elected by peers to RSD Advisory Council. Exceeded annuity and mutual fund production goals 2004 – 2008, with 30% growth of GDC year over year.

11/90-8/94 ***Jackson National Life, Brokerage Manager***

Overview: Jackson National was a leading provider of annuities and life insurance, locally servicing 3,200 agents. Inside and external wholesaling support to agents varying from large seminars to point of sale meetings. Coached agents with annuity and life insurance strategies, underwriting nuances, and policy placements.

Achievements: Introduced innovative marketing approaches: Wrote and arranged C.E. seminars. Lead development and execution of "Producer Playoff", a golf-themed Regional Sales Campaign. Created recruiting reply mail pieces that were adopted nationally by JNL. Assisted a national campaign which direct-marketed annuities to financial newsletter subscribers via affinity marketing agreements.

8/85–present* ***Medical Staff Insurance Services, Inc., President***

Personal producer. Developed hospital Medical Staff Associations to market disability insurance to physicians. Generated business through customized reply mail programs and centers of influence.
* Limited to management of renewal income from prior and incidental sales activities.

8/84 – 8/85 ***McGeorge School of Law,*** First year law student.

6/81 – 8/84 ***Insurance Broker***

Learned insurance brokerage business as an independent producer, marketing to physicians.

2/80 - 6/81 ***Home Life of New York***

Initially trained by local Agency in life insurance sales including Wilson Counselor Selling.

Professional Designations and Licenses:

Chartered Life Underwriter (CLU), The American College, conferred in 1999
Chartered Financial Consultant, (ChFC), The American College, conferred in 1999
Retirement income Certified Professional (RICP), The American College, conferred in 2016
FINRA General Securities Series 7, Registered Investment Advisor Series 65,
FINRA Registered Principal Series 24 and Blue Sky Series 63
Insurance licensed for Life, Health, Disability and Variable Contracts in 24 states

Professional Leadership:

2000-2001 Local President, NAIFA (*National Association of Insurance and Financial Advisors*).
Contributing Writer, Broker News, 1996 - 2001. Broker News was a national quarterly newspaper. 15 articles published regarding life insurance and annuity sales concepts.
Contributing Writer, Life Insurance Selling, September 2002. "VUL in Down Markets" article published in the annual issue focused on variable products.
Contributing Writer, CPA Magazine, June 2004 "Adding Financial Services to Your CPA Practice" published in the 2004 Financial Planning Issue

Education:

B.A. , Political Science, Kenyon College, Gambier, Ohio, 1979.
Kenyon is a small private liberal arts college.

Personal Information:

Married since 1981, two daughters, ages 24 and 29. Volunteer, Hospice of the Valley, since 2004.