

## Volunteer Opportunities

### TOWN OF PARADISE VALLEY COMMITTEE VOLUNTEER APPLICATION FORM

There are currently vacancies or potential vacancies on several of the Town's committees, commissions, and boards.

If you are interested in serving on any of these bodies, please complete this application and submit. The deadline to submit an application is February 8, 2018.

Please select committee(s) in which you are interested.\*

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|--|--|
| <input type="checkbox"/> Arts Advisory Committee       | <input checked="" type="checkbox"/> Mummy Mountain Preserve Trust        |
| <input type="checkbox"/> Board of Adjustment           | <input type="checkbox"/> Municipal Property Corporation                  |
| <input type="checkbox"/> Historical Advisory Committee | <input type="checkbox"/> Public Safety Personnel Retirement System Board |

Please provide the following background information.

Name*	Katrina C. Lessard
Address*	
Email*	
Home Phone	
Employer	Lessard Wealth Manager
Occupation	Wealth Manager
Business Phone	
Cell Phone	
Number of years as PV resident	3

Professional experience highlights

As a local business owner, I feel it is important to give back to the community. I was a volunteer for the Boys & Girls Club of Greater Scottsdale where I taught pre-teens/teens the financial concept basics that are unfortunately not taught in our school systems. I also provided our local library systems (Scottsdale & Phoenix) with financial literacy workshops to those in need for over five years.

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

As a Mummy Mountain resident, I feel it is important to maintain, preserve and protect the land on Mummy Mountain - as well as all the other mountains within the town's limits. As a committee member, I would help with renaming/rebranding the trust to include the surrounding mountains within the town. I think expanding on this would help with monetary donations. I have served on several fund raising committees and would help devise creative and fun ways to increase monetary funding for the trust.

Community Activities

2018 - Present: Recently appointed Board Member, Town of Paradise Valley Women's Association (Technology Chair) - Teach members how to use online programs such as Facebook, Google Forms, etc.

2017 - Present: Interest Group Chair, Town of Paradise Valley Women's Association (Happy Hour Chair) - Host a monthly happy hour for our members, spouses and guests at various locations across PV, Scottsdale and Phoenix.

Information on these committees and boards including descriptions, past agendas and minutes, and annual reports are available at <http://www.paradisevalleyaz.gov/82/Boards-Commissions>. Have you reviewed the materials posted materials?\*

Yes

No

Attach resume and cover letter

\* indicates required fields.

# Katrina C. Lessard, CFP®, CMFC®, RP®

CERTIFIED FINANCIAL PLANNER™

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## PROFESSIONAL SUMMARY

Experienced professional with a unique combination of business leadership, directing complex projects, developing strategies and collaborating with teams to enhance performance and processes. Adept at cultivating partnerships and building lasting relationships. Ability to empower and motivate others to succeed. Highly experienced comprehensive wealth manager.

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## SKILLS

- |                               |                            |  |
|-------------------------------|----------------------------|--|
| ❖ Strategic Business Planning | ❖ Persuasive Communication | ❖ Fostering Innovation                       |
| ❖ Market Analysis/Penetration | ❖ Leveraging Relationships | ❖ Effective Presentation Skills              |
| ❖ Creative Thinker            | ❖ Motivational Leadership  | ❖ Expertise in Estate, Tax & Wealth Planning |
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## WORK EXPERIENCE

### **President** (*August 2012 to Present*)

**Lessard Wealth Management** – *Gainey Ranch Financial Center / Scottsdale, AZ 85258*

*Successfully own and operate a wealth management practice while maintaining a book of business, prospecting for new clients and managing interns/staff.*

- ❖ Assist clients in developing complex legacy planning, tax planning and wealth management strategies
- ❖ Develop business plans/marketing strategies to expand profitability and market share
- ❖ Develop and maintain webpage and social media pages
- ❖ Maintain adherence with compliance and risk management policies

### **Vice President, Financial Consultant** (*February 2004 to July 2012*)

**Charles Schwab & Co., Inc.** – *Scottsdale Spectrum / Scottsdale, AZ 85253*

*Helped clients with comprehensive wealth management techniques while training/coaching internal employees.*

- ❖ Recruited to serve as Regional Wealth Ambassador to train advisors and managers on wealth planning tools
  - ❖ Increased wealth planning tool usage for the Scottsdale Investor Center by 85%
  - ❖ Assisted clients in developing wealth management strategies
  - ❖ Cultivated relationships with centers of influence to increase referral business
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## EDUCATION: Bachelor of Science in Economics (Minor in French)

Arizona State University - Tempe, AZ

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## DESIGNATIONS AND LICENSES

- Series 7, Series 63, Insurance License
- CFP® Designation (CERTIFIED FINANCIAL PLANNER™ Designation)
- CMFC® (Chartered Mutual Fund Counselor)
- RP® (Registered Paraplanner)



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