

CITY OF PEMBROKE PINES
ADVISORY BOARD AND COMMITTEE APPLICATION FORM

Please return the signed and completed application form and a recent resume to: City of Pembroke Pines, City Clerk's Office, 601 City Center Way, Pembroke Pines, Florida 33025.*

***NOTE: YOUR RESUME MUST ACCOMPANY THIS APPLICATION IN ORDER FOR THE APPLICATION TO BE CONSIDERED.**

Please type or use dark ink to complete this form.

Applicant Name Jorge E Gonzalez

Race* White Hispanic National Origin* Cuban American

Occupation Certified Financial Planner

Street Address 1961 NW 150 Ave Ste 201 Pembroke Pines 33028

Subdivision Hampton Park

Home Telephone 954-558-3463 Business Telephone 954-392-9797

E-mail Address Jorge@SynergyCFP.com

Length of Residence in Pembroke Pines
(if applicable)

Years

Months

25

Length of Time as Business Person in
Pembroke Pines (if applicable)

Years

Months

Are you a registered voter? Yes Commission District No. N/A Precinct No. 16

Do you have a criminal record? No If yes, please explain. _____

Have you ever been convicted of a felony? No If yes, please explain. _____

Do you have any criminal charges pending? No If yes, please explain. _____

Do you have any relatives employed by the City? No If yes, please state name(s): _____

Are you aware of any potential conflict of interest that may arise from your serving on this/these board(s)? No If yes, please explain. _____

Does your business, or your employer have any contractual relationship with, or do any business with the City? No If yes, please explain.

Do you have monies owed to the City that are delinquent? No If yes, please explain.

Do you have any pending code violations relating to property owned by you in the City? No If yes, please explain.

Do you have any violations relating to other City codes? No If yes, please list:

*The responses to these items is optional. The City is interested in providing for cultural diversity on its Advisory Boards and Committees, and seeks this information solely in order for the City to further its goal to provide for diversity on its Advisory Boards and Committees.

Which board or committees are of interest to you? Please indicate up to three preferences by ranking. Please denote your first choice with a "1," etc. Please place a number adjacent to any board or committee for which you wish to be considered. If you do not place a number next to a board or committee, the City Commission will not be able to consider you for that board or committee.

<u> </u> Arts & Culture Advisory Board	<u> </u> Affordable Housing ¹
<u> </u> Board of Adjustment	<u> </u> Charter High School Advisory Board ²
<u> </u> Economic Development Board	<u> </u> Education Advisory Board
<u> </u> Environmental Advisory Board	<u> </u> Citizens Committee/Hurricane Prep (Ad Hoc)
<u> </u> Planning & Zoning Board	<u>xx</u> Police and Fire Pension Fund Board
<u> </u> Diversity and Heritage Advisory Board	<u> </u> Social Media Committee (Ad Hoc)
<u> </u> Charter Review Board	<u> </u> Public Art Committee (PAC) New
<u> </u> Budget Committee (A. Castillo)	<u> </u> Charter Review Board ³
<u> </u> Citizen's Budget Advisory Board	

¹You must complete the "Supplement to Application for Affordable Housing Committee."

²Representative of Educational or Business sector of the Community

³This Board is convened once every five years.

Please provide a brief statement outlining why you wish to serve on the board(s) you have indicated above.

In the past, I have been a resident of Pembroke Pines, and my business has been in
Pembroke Pines for over 25 years. Serving on your board will allow
me to make a meaningful positive contribution to the
community that has provided so much to me and all these years.
I believe that my 38 years of experience in financial planning will
make a constructive contribution to your board.

I hereby certify that all statements made in this application are true and complete. Permission is granted to the City of Pembroke Pines to investigate and verify criminal and credit history and any information provided on this and successive documents completed for purposes of my appointment to the City Board or Committee. In return for consideration of my application, I release any person who provides information pertaining to me from all claims or liabilities that might otherwise result from such information or opinions.

Applicant's Signature

Date

09/13/2025

Applications for board and committee vacancies are accepted throughout the year. For additional information, please call the City Clerk's Office at (954) 450-1050.

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Resume – Jorge E. Gonzalez, CFP®, CFE®, CFF® | Candidate for Police & Firefighters' Pension Board – City of Pembroke Pines

Professional Summary

Financial planner advisor and fiduciary with over **38 years of experience** in retirement planning, pension distribution strategies, and wealth management. Founder of an independent financial advisory firm serving public employees, business owners, professionals, and families. Recognized for expertise in public pension systems, including retirement planning for firefighters, police officers, and teachers. Committed to integrity, fiduciary responsibility, and providing clear, practical financial guidance.

Professional Experience

Founder & CEO – Synergy Financial Strategies, Inc.

Pembroke Pines, FL | 2010 – Present

- Provide independent financial planning, retirement income strategies, and pension consulting.
- Conducted **hundreds of educational seminars and workshops** on retirement planning, Social Security strategies, and public pension systems, including **403(b), 401(k), Defined Benefit Pension Plan, and 457(b) plans**.
- Specialize in **DROP analysis**, pension maximization, and income distribution planning.
- Advise individuals and families on retirement income, asset protection, insurance, and estate planning.

Independent Advisor Representative – AE Wealth Management, LLC

Pembroke Pines, FL | 2018 – Present

- Deliver personalized investment advisory, financial planning, and wealth management services aligned with AEWM's best-interest standards and compliance framework.
- Collaborate with AEWM's Compliance and Supervision team to ensure regulatory adherence and client protection.
- Participate in ongoing training and education in accordance with AEWM's policies, including fiduciary duty, ethics, and advanced financial planning.
- Leverage AEWM's investment platforms, model portfolios, and third-party managers to construct diversified, client-centered portfolios.

Financial Planner Co-founder & President – Synergy Financial Group, Inc.

Pembroke Pines | 1989 - 2014

1961 NW 150th Ave. Suite 201 | Pembroke Pines, FL 33028

Ph. 954.392.9797 | Jorge@SynergyCFP.com | www.SynergyCFP.com

- Delivered retirement and investment planning for diverse clients.
 - Provided education on pension plans, Social Security optimization, and tax-efficient withdrawal strategies.
 - Developed customized financial strategies to help clients achieve secure retirements.
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Education & Training

- **Miami Dade College – Miami, FL (1998)**
Completed undergraduate studies with emphasis in Finance and Economics. Coursework included investment analysis, economic theory, and corporate finance.
 - **College of Financial Planning – Denver, CO (1995)**
Completed professional education in Financial Planning, including courses aligned with CFP® Board curriculum requirements.
 - **CERTIFIED FINANCIAL PLANNER™ (CFP®) (1996)**
Board-certified designation demonstrating advanced competency in retirement planning, tax strategies, estate planning, and investment management.
 - **CERTIFIED FINANCIAL EDUCATOR™ (CFEd®) (2018)**
Specialized training emphasizing financial literacy, client education, and retirement readiness.
 - **Certified Financial Fiduciary® (CFF®) (2023)**
Credential focusing on fiduciary responsibility, transparency, and client-first standards of care.
 - **Life & Health Insurance Licenses (1981 – Present)**
Active in 34 U.S. states including Florida, California, Georgia, and New Jersey (NPN# 469213).
 - **Advanced Continuing Education - Ongoing Participation**
 - Retirement income distribution strategies (pensions, Social Security, 403(b), 401(k), 457(b) plans).
 - Public pension systems, including DROP analysis and defined benefit/defined contribution structures.
 - Tax-efficient withdrawal planning integrating pensions, IRAs, and taxable accounts.
 - Insurance and risk management, including annuities and long-term care strategies.
 - **Compliance & Fiduciary Training – Ongoing Participation**
Ongoing compliance and fiduciary training ensuring adherence to current regulatory standards.
 - **Industry Conferences & Thought Leadership – Ongoing Participation**
Frequent participant in national retirement planning and wealth management conferences to maintain current knowledge of industry regulations, investment products, and best practices.
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Community & Civic Engagement

- Longstanding member of the **Pembroke Pines community**, where Jorge and his firm **Synergy Financial Strategies, Inc.** has been serving residents for over 30 years.
 - Has conducted **hundreds of educational seminars and workshops** covering topics such as **retirement readiness, Social Security strategies, pension education (including DROP), IRA and Roth IRA planning, and overall retirement plan management.**
 - Dedicated to improving financial literacy among public employees and the broader community through clear, accessible education.
 - Collaborates with **non-profit organizations** and community groups to extend financial education resources to those who might not otherwise have access.
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Personal

- **Background:** Born in Cuba and immigrated to the United States in 1969 at the age of five. Raised in South Florida, Jorge has built his career in **South Florida**, where his firm continues to serve the community.
- **Family:** Married to Shirley; together they have four adult children — Bruno, Jack, Paige, and Chase.
- **Interests:** Enjoys scuba diving, fishing, traveling, and recreational flying, activities that reflect discipline, curiosity, and lifelong learning.