

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 JOHN R. CURRAN

Race* WHITE National Origin* IRISH, GERMAN, SCOTISH BORN IN THE US

Occupation REGISTERED INVESTMENT ADVISOR

Street Address 10651 N.W. 20 ST

Subdivision PEMBROKE LAKES

Home Telephone 954-459-3361 Business Telephone 954-558-5149

E-mail Address JOHNRC1156@AOL.COM

Length of Residence in Pembroke Pines (if applicable) 23 Years 0 Months

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

Are you a registered voter? YES Commission District No. _____ Precinct No. _____

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)? YES If yes, please explain. I AM A REGISTERED INVESTMENT ADVISOR, CANNOT VOTE ON ANY BUSINESS WITH ANY CETERA COMPANIES POSSIBLY GENSTAR OUR PRIVATE EQUITY PARTNER

Does your business, or your employer have any contractual relationship with, or do any business with the City? NA 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.

_____ Arts & Culture Advisory Board

_____ Affordable Housing¹

_____ Board of Adjustment

_____ Charter High School Advisory Board²

_____ Economic Development Board

_____ Education Advisory Board

_____ Environmental Advisory Board

_____ Citizens Committee/Hurricane Prep
(Ad Hoc)

_____ Planning & Zoning Board

☒ Police and Fire Pension Fund Board

_____ Diversity and Heritage Advisory Board

_____ Social Media Committee (Ad Hoc)

_____ Charter Review Board

_____ **Public Art Committee (PAC) New**

_____ **Budget Committee (A. Castillo)**

_____ Charter Review Board³

_____ Citizen's Budget Advisory Board

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

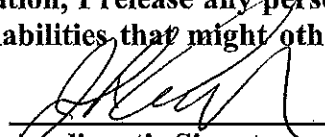
²Representative of Educational or Business sector of the Community

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.

TO HELP THE CITY SAFELY MANAGE THE ASSETS,
TO REDUCE FUTURE LIABILITIES, TO KEEP THE POLICE +
FIRE PENSION FUNDED, WILLING TO TALK TALLAHASSEE
ABOUT OTHER INVESTMENT OPTIONS. I HOLD 23
PROFESSIONAL CERTIFICATIONS IN THE FINANCIAL
SERVICE INDUSTRY, THEY WERE AWARDED BY
THE AMERICAN COLLEGE OF FINANCIAL SERVICES, WHARTON
SCHOOL OF UNIVERSITY OF PENNSYLVANIA, COLLEGE FOR
FINANCIAL PLANNING, LIMRA, NATIONAL ASSOCIATION
OF PLAN ADVISORS,

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

10-8-25
Date

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.

SSG:DNT:dnt

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John Curran

CERTIFIED FINANCIAL PLANNER

(954) 558-5149

johnrc1156@aol.com

PEMBROKE PINES 33026

Forward-thinking financial professional with extensive experience in asset allocation, retirement planning, and portfolio management. Adept at leveraging problem-solving skills and creative thinking to deliver customized financial solutions. Seeking to contribute expertise as a Certified Financial Planner to support and grow within a dynamic financial team.

SKILLS

- Creative thinking
- Forward-thinking
- Insurance planning
- Verbal and written communication
- Customer Service-oriented
- Problem-solving skills

EXPERIENCE

INVESTMENT ADVISOR

Cetera

Sunrise, FLORIDA

June 2019 - Present

- Identified and evaluated potential investment opportunities for clients.
- Provided asset allocation services, retirement planning, portfolio management, and estate planning solutions.
- Communicated regularly with clients via phone calls, emails and face-to-face meetings.

INVESTMENT ADVISOR

Foresters

Sunrise, FL

January 1994 - June 2019

- Identified and evaluated potential investment opportunities for clients.
- Provided asset allocation services, retirement planning, portfolio management, and estate planning solutions.
- Communicated regularly with clients via phone calls, emails and face-to-face meetings.

MANAGEMENT

Pantry Pride Stores

Fort Lauderdale, FL

February 1972 - December 1992

- Provided administrative support to senior management, including calendar management and scheduling meetings.
- Advised management on corporate governance matters.
- Coached individuals on effective time management techniques.

EDUCATION

FINACIAL PLANNING IN FINANCE

The American College of Financial Services, **Philadelphia**

ACCREDITED IN ASSET MANAGEMENT IN INVESTMENT MANAGEMENT

College for Financial Planning, **Denver**

CERTIFIED EMPLOYEE BENEFIT SPECIALIST IN PENSIONS

Wharton School of The University of Pennsylvania, **Philadelphia**

FELLOW OF LIFE MANAGEMENT INSTITUTE IN RISK MANAGEMENT AND INSURANCE

Loma Limra, **Windsor Connecticut**

GENERAL IN GENERAL

Miami Dade College, **Miami Florida**

PLAN FIDUCIARY IN RETIREMENT PLANS

National Association of Plan Advisors, **Arlington Virginia**

CERTIFICATIONS

- Certified Financial Planner
- Chartered Life Underwriter
- Registered Health Underwriter
- Wealth Management Certified Professional
- Certified Advisor in Senior Living
- Retirement Plan Associate
- Accredited in Asset Management
- Accredited Domestic Partner Advisor
- Fellow of Life Management Institute
- Associate of Financial Services Institute
- Certified Nonqualified Plan Advisor
- Chartered Financial Consultant
- Registered Employee Benefits Consultant
- Chartered Healthcare Consultant
- Retirement Income Certified Professional
- Certified Employee Benefit Specialist
- Group Benefit Associate
- Accredited in Wealth Management
- Certified Retirement Planning Consultant
- Associate in Agency Administration
- Certified Plan Fiduciary Advisor

VOLUNTEER EXPERIENCE

BOARD OF DIRECTORS MIAMI DADE PUBLIC SCHOOLS

National Academy of Finance

Miami, FLORIDA

April 2002 - Present

- Demonstrated ability to manage multiple tasks while remaining adaptable and flexible.
- Participated in ongoing training to enhance own job skills and knowledge.
- Focused on learning new skills and staying updated with industry changes.