

**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 Jason Oestreicher, CFP®

Race\* White National Origin\* USA

Occupation CFP® professional, Financial Advisor, Founder of PATH Financial Partners

Street Address 1541 NW 182nd Terrace, Pembroke Pines, FL 33029

Subdivision Silver Lakes, Malibu Pointe

Home Telephone 954-547-9161 Business Telephone \_\_\_\_\_

E-mail Address jasonoest@yahoo.com

Length of Residence in Pembroke Pines (if applicable) 41 \_\_\_\_\_  
Years Months

Length of Time as Business Person in Pembroke Pines (if applicable) 1 6  
Years Months

Are you a registered voter? Yes Commission District No. 3 Precinct No. ~~100~~ X025

Do you have a criminal record? Yes as Minor If yes, please explain. Trespassing at age 13.  
This was a juvenile matter. Please see attached supporting documentation I use for nearly every regulatory position.

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. \_\_\_\_\_

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

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

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

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

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\*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.**

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|---|--|
| <u>      </u> Arts & Culture Advisory Board         | <u>      </u> Affordable Housing <sup>1</sup>  |
| <u>      </u> Board of Adjustment                   | <u>      </u> Charter High School Advisory Board <sup>2</sup>                        |
| <u>      </u> Economic Development Board            | <u>      </u> Education Advisory Board   |
| <u>      </u> Environmental Advisory Board          | <u>      </u> Citizens Committee/Hurricane Prep<br>(Ad Hoc)                          |
| <u>      </u> Planning & Zoning Board               | <input checked="" type="checkbox"/> <u>      </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> <b>Public Art Committee (PAC) New</b>                                  |
| <u>      </u> Citizen's Budget Advisory Board       | <u>      </u> Charter Review Board <sup>3</sup>                                      |

<sup>1</sup>You must complete the “Supplement to Application for Affordable Housing Committee.”

<sup>2</sup>Representative of Educational or Business sector of the Community

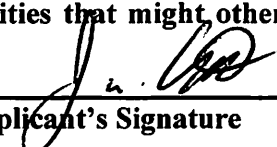
<sup>3</sup>This Board is convened once every five years.

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

I am a long time resident of Pembroke Pines and a CFP® professional who has built my career working with public employees, including educators, administrators, police, fire, and municipal workers. My firm focuses on retirement planning, investment advisory, tax strategy, and estate planning, with a strong emphasis on Defined Benefit, Defined Contribution, and long term financial decision making.

I have helped thousands of individuals navigate complex retirement decisions and understand how financial policies impact their lives. That experience gives me a practical, real world perspective that I believe would be valuable in serving the City. I care deeply about this community. This is where I grew up, went to school, where I now live with my family, and where I am building my business. I want to be more involved and contribute in a meaningful way to the community that has given so much to me and my family. I take pride in Pembroke Pines and would value the opportunity to give back by applying my experience, being actively engaged, and helping support the city long term.

**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

3-26-26  
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.

## Jason Oestreicher, CFP®

Pembroke Pines, Florida | 954 547 9161 | jasonoest@yahoo.com

### PROFESSIONAL SUMMARY

CFP® professional and founder of PATH Financial Partners with nearly two decades of experience in financial planning, investment advisory, and retirement strategy. Extensive experience working with public sector employees, including educators, administrators, and municipal professionals, with a strong focus on pension systems such as the Florida Retirement System.

Provides a practical, fiduciary-minded perspective on retirement income planning, long-term financial sustainability, and risk management. Has guided hundreds of individuals through complex retirement decisions, including pension elections and distribution strategies. Deeply rooted in the Pembroke Pines community and committed to contributing thoughtful, informed oversight in service to its residents.

### PROFESSIONAL EXPERIENCE

*Co-Founder | Financial Advisor*

**PATH Financial Partners** | Pembroke Pines, Florida | 2024 – Present

- Founded an independent financial planning and investment advisory firm focused on comprehensive, long-term financial decision making
- Advise individuals and families on retirement income, pension optimization, investment strategy, tax planning, and estate coordination
- Work extensively with public employees, including Broward County educators and administrators, on retirement readiness and pension-related decisions
- Provide guidance on complex retirement structures, including defined benefit pensions, DROP programs, and rollover strategies
- Coordinate with institutional investment managers to ensure disciplined portfolio management aligned with client objectives
- Emphasize fiduciary responsibility, transparency, and long-term financial sustainability in all client recommendations

*Senior Financial Advisor*

**AIG / VALIC (now Corebridge Financial)** | 2009 – 2024

- Managed a large and diverse book of business over a 15-year tenure
- Specialized in retirement planning for public sector employees, including school systems, universities, hospitals, and municipalities
- Developed deep expertise in pension systems and retirement income planning
- Recognized as a top-performing advisor, including President's Cabinet distinction for 5 straight years.
- Conducted financial education and retirement planning sessions for large groups and

individual clients

- Advised clients through market cycles, retirement transitions, and long-term income planning decisions

*Financial Advisor*

**Merrill Lynch** | Jacksonville, Florida | 2007 – 2009

- Provided investment guidance and financial planning during a period of significant market volatility
- Developed strong foundation in portfolio management, risk assessment, and client communication

*Financial Advisor*

**Ameriprise Financial** | 2006 – 2007

- Began career in financial planning and investment advisory while getting fully licensed.
- Built foundational experience in client service, financial strategy, and long-term planning

## **CREDENTIALS**

- CFP® professional
- Series 7 and 66 Licensed (Fiduciary License)

## **RELEVANT EXPERTISE FOR BOARD SERVICE**

- Pension systems and retirement income planning
- Long-term financial sustainability and risk management
- Investment oversight and portfolio structure
- Tax-aware distribution strategies
- Fiduciary responsibility and client-first decision making
- Public sector employee benefits
- Financial education and community engagement

## **COMMUNITY CONNECTION**

- Long-time resident of Pembroke Pines and homeowner since 2015
- Built a business serving local residents and public employees within the community
- Trusted advisor to members of the Broward County School Board system, including administrators and leadership
- Strong personal and professional commitment to the long-term success and stability of the local community

## **PERSONAL**

- Married with two children
- Deep roots in the Pembroke Pines community
- Interests include travel, golf, and scuba diving

Jason Oestreicher  
1541 NW 182 Terrace  
Pembroke Pines, FL 33029  
JasonOest@yahoo.com  
954-547-9161

March, 26 2026

To Whom It May Concern:

I am currently applying for the City of Pembroke Pines Advisory Board and Committee. As part of this process, I have been asked to provide a written explanation of an incident from my childhood when I was 13 years old. Below is the requested clarification.

On the evening of April 4, 1998, when I was 13 years old, I was spending time with older kids and ended up on the roof of a school to enjoy a view of the city at night. While there, we noticed an unlocked door and, out of curiosity, decided to explore inside. During this exploration, a friend and I found a fire extinguisher and, driven by youthful curiosity, took it outside to an adjoining field to see what it emitted. Our intention was not to steal or cause any damage; we planned to return it to its place in the school. However, while doing so, the Pembroke Pines Police Department arrived and took us into custody.

That night, I was detained at a juvenile facility and charged with burglary and grand theft. The burglary charge was later reduced to misdemeanor trespassing, and the grand theft charge was dismissed when the prosecution chose to file *nolle prosequi*. The school recognized the incident as an innocent exploration with no intent to harm and did not pursue further action, and the case was never re-opened or prosecuted. I hope this explanation clarifies the incident in question. Please feel free to contact me at the phone number, email address, or street address listed above if you require further clarification or information. Thank you for your consideration.

Sincerely,

A handwritten signature in black ink, appearing to read 'J. Oest', written in a cursive style.

Jason Oestreicher