DATE: 11-12-12

TO: City Clerk

FROM: Mayor John F. Cook

ADDRESS: Two Civic Center Plaza, 10th Floor TELEPHONE (915) 541-4145

Please place the following item on the (Check one): CONSENT XXX REGULAR ____

Agenda for the Council Meeting of Tuesday, November 27, 2012

Item should read as follows: Kyong Peterson to the Tax Advisory Committee by Mayor John F. Cook.

BOARD COMMITTEE/COMMISSION APPOINTMENT/REAPPOINTMENT FORM

NAME OF BOARD/COMMITTEE/COMMISSION: Tax Advisory Committee

NOMINATED BY: Mayor John F. Cook DISTRICT: N/A

NAME OF APPOINTEE Kyong Peterson
(Please verify correct spelling of name)

BUSINESS ADDRESS: Morgan Staley, 641 N. Stanton St.

CITY: El Paso ST: TX ZIP: 79901 PHONE: (915) 842-7908

HOME ADDRESS: ____

CITY: ____ ST: ____ ZIP: ____ PHONE: ____

DOES THE PROPOSED APPOINTEE HAVE A RELATIVE WORKING FOR THE CITY? YES: ___ NO X

IF SO, PLEASE PROVIDE HIS OR HER NAME, CITY POSITION AND RELATIONSHIP TO THE PROPOSED APPOINTEE:

WHO WAS THE LAST PERSON TO HAVE HELD THIS POSITION BEFORE IT BECAME VACANT?

NAME OF INCUMBENT: Don Schulte

EXPIRATION DATE OF INCUMBENT: Expired

REASON PERSON IS NO LONGER IN OFFICE (CHECK ONE): TERM EXPIRED: XX
RESIGNED ____
REMOVED ____

DATE OF APPOINTMENT: 11-27-12

TERM BEGINS ON : 11-27-12

EXPIRATION DATE OF NEW APPOINTEE: 11-26-13

PLEASE CHECK ONE OF THE FOLLOWING: 1st TERM: XX

2nd TERM: ____

UNEXPIRED TERM: ____

Kyong Peterson
108 Puesta Mirador · Santa Teresa, NM 88008
(915) 373-6070

January 2, 2001 – Present
Financial Advisor
Morgan Stanley Smith Barney

Responsibilities:

- Analyze client needs and recommend appropriate strategies
- Build client relationships based upon developing strategies to their financial goals through the use of financial planning and wealth management
- Prepare and deliver presentations/seminars to clients and prospects based on their particular financial need/goal
- Attend Financial Advisor meetings and remain current on continuing education sessions to stay compliant with all educational/licensing requirements
- Devise debt liquidation plans that include payoff priorities and timelines
- Guide clients in the gathering of information such as bank account records, income tax returns, life and disability insurance records, pension plan information, and wills.
- Interview clients to determine their current income, expenses, insurance coverage, tax status, financial objectives, risk tolerance and other information needed to develop a financial plan.
- Monitor financial markets trends to ensure that plans are effective, and to identify necessary updates.
- Prepare and interpret for clients' information such as investment performance reports, financial document summaries, and income projections.
- Recommend strategies clients can use to achieve their financial goal and objectives, including specific recommendations in areas such as cash management, insurance coverage including long term care insurance, and investment planning.
- Meet with clients' other advisors including attorneys, accountants, trust officers, to fully understand clients' financial goals and circumstances.

Education:

Bachelor's of Social Work 1995
University of South Florida Tampa, FL

Volunteer:

President: Board of Director's for the EPISD Education Foundation Jan. 2010-Present