



City of Coconut Creek

Application for Planning & Zoning Board

The information requested below is for consideration of appointment to the City's Planning & Zoning Board. Please complete and return this form to the City Clerk, **WITH a brief resume** of your experience by or before Monday, April 6, 2020.

PLEASE NOTE: Florida has a very broad public records law. Documents relating to city business are public records and are available to the public and media upon request. Your information provided within this application may therefore be subject to public disclosure. If your information meets an exemption pursuant to state statute, please advise the City Clerk.

Last Name: Realejo	Phone:	860-227-8858
First Name: Jeffrey	Alternate Phone:	954-785-5400 x 1005
Home Address: 3700 NW 20 th St. Coconut Creek, FL 33066	E-mail:	Jdrealejo@gmail.com

The Planning & Zoning Board is comprised of five regular members and one alternate member for a one-year term. The members are appointed by the City Commission and given the responsibility for the city's comprehensive planning program, and as required by F.S. § 163.3174, shall be designated as the city's local planning agency. The planning and zoning board shall advise on all matters pertaining to land planning and plan implementation. The board shall have the power to conduct investigations, hold public hearings, take testimony, review documentary evidence, issue orders, and make recommendations to the city commission on all activities relating to land planning and plan implementation.

To the extent practicable, board appointments shall be based on the applicant's experience in the fields of Architecture, Construction, Engineering, Environmental science, Land use, Land development, Landscape architecture, Law, Real Estate, Sustainability, or Urban planning.

Preference will be given to applicants who have completed Coconut Creek Citizen's Academy.

The board meets regularly on the second Wednesday of each month. Appointments will be made at the April 23, 2020, City Commission Meeting

Please mark Yes OR No for each of the following questions:

1. Are you at least 18 years of age and a resident of Coconut Creek? Yes No
2. Are you least 18 years of age and an owner of a business located within the City with a business tax receipt issued by the city for operation at the location? Yes No
3. Do you have experience in Architecture, Construction, Engineering, Environmental science, Land use, Land development, Landscape architecture, Law, Real Estate, Sustainability, or Urban planning? Yes No
4. Do you demonstrate a strong and sincere commitment to or possess of an outstanding reputation for civic activity and interest, integrity, and responsibility? Yes No
5. Do you hold a public office? Yes No
6. Are you employed by the City? Yes No

7. Are you a member of another City Board?

Yes No

8. Have you ever served on a City Board?

Yes No

9. Will you be away from the City for extended periods of time?

Yes No

10. Have you graduated from the City's Citizen Academy?

Yes No

Signature:



Date:

5/26/2020

Jeffrey Realejo, CFP®



✉ Jdrealejo@gmail.com

☎ (860) 227-8858

📍 Coconut Creek, FL

🌐 www.linkedin.com/in/jrealejo/

Who Am I?

- Highly motivated self-starter who is fully committed to participating in improving his community.
- CERTIFIED FINANCIAL PLANNER™ with 4+ years of experience.
- Well-developed analytical and problem-solving skills.
- Expertise in gathering, interpreting, and communicating data.

Professional Experience

Associate Wealth Manager 📅 October 2017 – Present

[Heritage Investment Group](#) ♦ [Pompano Beach, FL](#)

- Work directly with 80+ clients in all areas of wealth management including investments, tax, estate, insurance, and retirement.
- Develop relationships with local professionals to generate prospective client referrals.
- Converted CRM database containing 5,200 contact records to new cloud-based CRM software and implemented new workflows, policies, and procedures to improve efficiency.

Associate Financial Advisor 📅 August 2016 – August 2017

[Tobias Financial Advisors](#) ♦ [Plantation, FL](#)

- Assisted Senior Advisors in working with clients in all areas of comprehensive financial planning.
- Analyzed investment opportunities, designed portfolios, and continuously monitored over 500 accounts.
- Designed and implemented 3(21) and 3(38) ERISA Fiduciary Retirement Plan Advisory Services for the firm.

Investment Consultant 📅 June 2015 – July 2016

[Sentinel Benefits & Financial Group](#) ♦ [Wakefield, MA](#)

- Offered fee-based financial planning services with a focus on retirement planning and asset management.
- Provided education and guidance to retirement plan participants to help maximize their retirement benefits.
- Worked closely with plan sponsors to implement custom retirement programs and employee benefits packages.

Leadership Experience

President 📅 June 2020 – Present

[Early Bird Toast Masters](#) ♦ [Fort Lauderdale, FL](#)

- Provide helpful and supportive leadership for all club activities.

Education Committee Chair 📅 January 2020 – Present

[META Broward](#) ♦ [Fort Lauderdale, FL](#)

- Identify, plan, and execute activities focused on personal and professional development

Board Member 📅 July 2019 – Present

[The Exchange Club of Pompano Beach](#) ♦ [Pompano Beach, FL](#)

- Advise leadership on club operations, activities, and community projects.

President 📅 May 2014 – May 2015

[National Society of Collegiate Scholars](#) ♦ [Kingston, RI](#)

- Managed the chapter's overall goals and direction for the year and maintained relations with national office.

Guiding Principle

- ✦ Rome was not built in a day, but it was built one day at a time.

Education

B.S. in Finance

[The University of Rhode Island](#)

Business and Global Trade Graduate

[The Washington Center](#)

Most Influenced By

- 🏠 Growing up around a family business.
- 👯 Building and maintaining strong friendships.
- ❓ Curiosity; understanding processes, concepts, and businesses.

Skills

Language: Basic understanding of Spanish

Computer: Salesforce, Microsoft Office (Excel, Word, PowerPoint, Outlook), Mac OS, Microsoft 365, Microsoft Dynamics

Strengths

Data Analysis ♦ Forecasting ♦ Efficiency
Building Relationships ♦ Communication

Professional Licenses

- CERTIFIED FINANCIAL PLANNER™
- FINRA Series 7 & 66 CRD #6364642
- Florida 0215- Unaffiliated - Life Including Variable Annuity & Health NPN # 17765748

Involvement

- Toastmasters International
📅 April 2019 - Present
- Broward Public Library Foundation
📅 August 2019 - Present
- The Exchange Club of Pompano Beach
📅 May 2018 - Present
- The First Tee of Broward County
📅 June 2017- April 2019
- URI 101 Mentor
📅 September 2014 - December 2014
- URI Career Services
📅 September 2014 - May 2015
- Sigma Phi Epsilon
📅 January 2012 - May 2015