



**Contra
Costa
County**

For Office Use Only
Date Received:

EMAIL TO:
Contra Costa County
Human Resources Department
jobs@hrd.cocounty.us

PLEASE TYPE OR PRINT IN INK

TREASURER TAX COLLECTOR APPLICATION

1. Name: Barsotti Edith "Patti" Patricia
 (Last Name) (First Name) (Middle Name)

2. Address: [Redacted]
 (No.) (Street) (Apt.) (City) (State) (Zip Code)

3. Phones: [Redacted]
 (Home No.) (Work No.) (Cell No.)

4. Email Address: [Redacted]

5. EDUCATION: Check the appropriate box if you possess one of the following:
 High School Diploma G.E.D. Certificate California High School Proficiency Certificate
 College or other advanced education/training
 Give Highest Grade or Educational Level Achieved: BA, CFP

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Degree Type
A) California State University S.F.	Business/Organizational Behavior	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	BA
B) UC Berkely Extension	Personal Financial Planning Certificate	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	
C)	Certified Financial Planner	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Needs to be renewed
D) Other schools / training completed: Licensed RE Agent & MNLS	Course Studied Real Estate Mortgage lending	Hours Completed All course completed DRE 01005341 Mortgage lender #1188903	Certificate Awarded: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve as the County Treasurer-Tax Collector. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) From <u> </u> To <u> </u> 3/20/17 Current</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 6 years 8 months</p> <p>Hrs. per week <u>varys</u>. Volunteer <input type="checkbox"/></p>	<p>Title City of Concord Treasurer</p> <hr/> <p>Employer's Name and Address 1950 Parkside Concord, CA</p>	<p>Duties Performed City's portfolio & IP - Effect. M:</p>
<p>B) Dates (Month, Day, Year) From <u> </u> To <u> </u></p> <p>Total: <u>Yrs.</u> <u>Mos.</u></p> <p>Hrs. per week <u> </u>. Volunteer <input type="checkbox"/></p>	<p>Title Continued from above</p> <hr/> <p>Employer's Name and Address Please see attached resume.</p>	<p>Duties Performed Cashflow monitoring & reports</p>
<p>C) Dates (Month, Day, Year) From <u> </u> To <u> </u> 1984 2019</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 35 years</p> <p>Hrs. per week <u>40 ++</u>. Volunteer <input type="checkbox"/></p>	<p>Title VP and Manager MechanicsBan</p> <hr/> <p>Employer's Name and Address Walnut Creek and Other Banks</p>	<p>Duties Performed Managed from 5 -35 employees</p>
<p>D) Dates (Month, Day, Year) From <u> </u> To <u> </u> 1990 Current</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 33</p> <p>Hrs. per week <u>varys</u>. Volunteer <input checked="" type="checkbox"/></p>	<p>Title Kiwanis International</p> <hr/> <p>Employer's Name and Address Global</p>	<p>Duties Performed Many Leadership/Training duties</p>

7. Do you have any financial relationships with the County such as grants, contracts, or other economic relations?

No Yes

If Yes, please identify the nature of the relationship: _____

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publicly accessible. I understand and agree that any misstatements / omissions of material fact may cause forfeiture of my rights to appointment as the Treasurer-Tax Collector.

Sign Name: E.P. Barsotti Date: 11/18/2023

Important Information

1. Your application and any attachments you provide are public documents and are subject to the California Public Records Act (CA Gov. Code §6250-6270), and will be posted online.
2. The completed application and supplemental questionnaire must be received by 11:59 PM on Wednesday, November 22, 2023 by email to jobs@hrd.cccounty.us.
3. Applicants must complete the Supplemental Questionnaire (below). Attach pages for Supplemental Questionnaire. A resume or other relevant information may be submitted with this application.
4. Applicants may be required to complete a Statement of Economic Interests (California Fair Political Practices Commission Form 700) and authorize the County to conduct a background check, including but not limited to a social media/internet check, credit check and Live Scan fingerprinting.

Supplemental Questionnaire

1. Are you a United States Citizen?
2. Are you registered to vote in the State of California?
3. Are you a resident of Contra Costa County?
4. Describe specific public service or private sector positions you have held which you believe best qualify you for the position of Treasurer Tax Collector. Indicate major accomplishments in each position. Please identify each role by employer, job title, and length of time held.
5. Are you prepared to seek election to this office in 2026?
6. Do you consider this job to be full-time or part-time?
7. In addition to the foregoing, please indicate any special qualifications, skills, training, or achievements you possess which are relevant to consideration for this position.

Supplemental Questionnaire: Patti Barsotti, City of Concord – Elected Treasurer

1. Are you a United States Citizen? **Yes**
2. Are you registered to vote in the State of California? **Yes**
3. Are you a resident of Contra Costa County? **Yes**
4. Describe specific public service or private sector positions you have held which you believe best qualify you for the position of Treasurer - Tax Collector. Indicate major accomplishments in each position. Please identify each role by employer, job title and length of time held.

Answer to 4.

1. City of Concord, Elected Treasurer, 6 years.

In March 2017, the Concord City Council appointed me to complete the remaining term of the departing City Treasurer, Tim McGallian. Following this appointment, I secured an electoral mandate in 2018, earning a four-year term. Remarkably, I was re-elected in November 2022 amidst strong competition, securing an impressive 74% of the votes.

As the elected Treasurer, my role primarily involves providing advisory services and oversight, while the Senior Financial Analyst, a city employee in the Finance Department, prepares reports for the office of the City Treasurer. Key areas of focus and responsibility include:

- Effectively managing the city's investment portfolio with a focus on safety, liquidity, and return. The portfolio is managed by PFM, and quarterly in-person meetings with portfolio managers from PFM keep me well-informed about market trends and our portfolio's performance.
- Monitoring cash flow requirements to ensure sufficient liquidity for the city's financial needs.
- Providing timely quarterly investment portfolio reports to the City Council within 45 days of each quarter-end.
- Reviewing and updating the city's investment policy annually before submission to the City Council.

Major accomplishments in this role include providing input to the Investment Policy, enhancing the safety of the city's portfolio, and upgrading cash flow requirements for improved reporting.

2. Mechanics Bank, Vice President/Business Development, 14 years

In 2019, I departed from Mechanics Bank, where I held the roles of Certified Financial Planner (CFP®) and Certified Wealth Strategist (CWS®), though these certifications were not renewed.

Over the last decade in banking, I achieved numerous learning credits and certifications in investment management. I collaborated with the investment team to transition high-value clients to invest within the Bank's investment department. My professional growth is underscored by assuming additional responsibilities over the years, including leadership roles. Notably, I excelled as a top sales producer and managed branches with varying numbers of employees.

5. Are you prepared to seek election to this office in 2026? **Yes**
6. Do you consider this job to be full-time? **Yes**

7. In addition to the foregoing, please indicate any special qualifications, skills, training, or achievements you possess which are relevant to consider for this position.

Answer to 7.

Special qualifications, skills, and training included above.

Summary of demonstrated applicable skills and experience, during banking career.

(Please see my attached resume.)

- A. Communication Skills
- B. Investment and financial acumen
- C. Analytical Analysis
- D. Professionalism
- E. Collaboration/team player
- F. Critical Thinking
- G. Adaptability
- H. Time Management
- I. Management skills
- J. Relationship management
- K. Emotional Intelligence
- L. Sense of humor

Summary of Education and Community Service

I attained my Bachelor of Arts in Business from San Francisco State University and completed the Professional Financial Planning Course at the University of California, Berkeley Extension. Over the course of three-plus decades, I held various positions at different banks, each move driven by the acceptance of roles with increasing responsibilities.

In addition to my financial qualifications, I have garnered recognition as a dedicated volunteer, leader, motivator, and community service provider. Throughout my 30+ years of involvement with Kiwanis International, I have assumed numerous leadership roles, including serving as the governor of its California-Nevada-Hawaii district and as a Kiwanis International Trustee from 2013 to 2016. I also held the position of past president of the Kiwanis Club of Concord.

My additional community engagement extends to serving on the Education Committee for the California Municipal Treasures Association, past board of directors for both the Greater Concord Chamber of Commerce and the Walnut Creek Chamber of Commerce. I have also had the honor of being the past president of the National Speakers Association, Northern California. Having resided in Concord for the majority of the last 44 years, my husband and I are deeply rooted in the local community.

Prepared 11/20/23.

Patti Barsotti



November 20, 2023

Board of Supervisors
Contra Costa County
625 Court St.
Martinez CA 94553
jobs@hrd.cccounty.us

Dear Supervisor John M. Gioia,
Supervisor Candace Andersen,
Supervisor Diane Burgis,
Supervisor Ken Carlson,
Supervisor Federal D. Glover,

I am writing to express my interest in the Treasurer-Tax Collector position with Contra Costa County, as advertised. With a comprehensive background in finance, extensive experience in leadership roles, and a proven track record of success, I am confident in my ability to contribute effectively to the County's financial management and strategic goals.

My current role as the Treasurer for the City of Concord has equipped me with a thorough understanding of the responsibilities associated with overseeing financial matters. I have successfully overseen the city's investment portfolio, ensuring safety, liquidity, and optimal returns. In addition to providing quarterly investment reports to the City Council, I have played a key role in updating and implementing the city's investment policy to enhance overall financial security.

My previous experience as a Vice President in Wealth Management at Mechanics Bank, where I held the titles of CFP® and CWS®, allowed me to develop a strong foundation in financial planning and investment strategy. Worked with individuals, business and municipalities. I have a proven ability to facilitate cultural change within organizations, as demonstrated by my success in educating branch offices and fostering a collaborative environment that resulted in a significant increase in referral activities.

Throughout my career, I have held various leadership positions in reputable financial institutions such as Union Bank of California, Heritage Bank, California Bank & Trust, and others. These roles have provided

me with diverse experiences in risk management, business development, relationship management, and team leadership.

In addition to my professional achievements, I am deeply committed to the values of racial equity, diversity, and inclusion. My involvement in community and business development activities, including my role as a Trustee for Kiwanis Children's Fund and Kiwanis International, further underscores my dedication to social responsibility and community engagement.

I am a registered voter of Contra Costa County and meet the criteria outlined in the job summary. My educational background includes a Bachelor of Arts in Business from San Francisco State University, and I have furthered my expertise through certifications as a Certified Financial Planner (CFP®) and Certified Wealth Strategist (CWS®).

I am excited about the opportunity to bring my skills, experience, and commitment to Contra Costa County as Treasurer-Tax Collector. I have attached my resume for your reference, and I look forward to the possibility of discussing how my qualifications align with the needs of the County.

Thank you for considering my application. I am available at your earliest convenience for an interview.

Sincerely,

Patti Barsotti

Treasurer City of Concord

Professional Experience

Self Employed Realtor®

Weichert Real Estate Broker #01485818

DRE #01005341 | NMLS #1188903

December 2019 - Present

- Developed a comprehensive business plan encompassing mortgage lending and real estate sales.
- Continuously pursued education to enhance skills and offer holistic client services.
- Maintained a full-time work commitment while incorporating flexibility.
- Provided business consultation and coaching on personal financial education for individuals and business growth.

City of Concord Treasurer

March 2017 - Present

- Appointed by the Concord City Council in March 2017 to fill the remaining term as Treasurer.
- Successfully elected to serve a four-year term in 2018 and re-elected in November 2022 with a 74% majority vote.
- Advise on managing the city's investment portfolio, focusing on safety, liquidity, and return.
- Oversee quarterly investment portfolio reports to the City Council, ensuring compliance with established timelines.
- Collaborated with the Finance Department's Senior Financial Analyst to review and update the city's investment policy annually.
- Joined and attended California Municipal Treasurers Association, CMTA. On the Education Committee.

Mechanics Bank

Vice President, Wealth Management Trust and Investments, CFP®, CWS® Private Banker

January 2008 - December 2019

- Educated branch offices on wealth management, emphasizing trust and investment services.
- Implemented cultural change, fostering collaboration and partnership with staff across 25 retail offices.
- Achieved a significant increase in referral activities from two to over 400+ in the first year.
- As a Certified Wealth Strategist (CWS®), conducted client meetings to assess personal financial situations and provide tailored recommendations.
- Collaborated with businesses and municipalities to review investment policies and address 401k and investment needs.

Mechanics Bank

Vice President Manager, Danville Office

August 2005 - January 2008

- Led all aspects of the Danville office, including staffing, customer satisfaction, business development, and sales goals.
- Transferred from the Retail lending group as VP Sr. Commercial Loan Officer, responsible for developing loan business and managing credit facilities.
- Accepted the Danville office manager position in February 2006.

Education

- **Certified Financial Planner (CFP®)**, 2011-2019
- **Certified Wealth Strategist (CWS®)**, 2011-2019
- **Bachelor of Arts in Business**, San Francisco State University
- **Personal Financial Planning Certificate**, UC Berkeley Extension
- **Commercial Lending Training Program**, Bank of America

Community and Business Development Activities

- Kiwanis International Trustee for Kiwanis Children's Fund 2018-2021
- Kiwanis International Membership Chair worldwide 2019-2021
- Past Kiwanis International Trustee 2013-2016
- Past Governor Kiwanis International – California Nevada Hawaii district
- Super Distinguished, With Honors and Hall of Fame, Lt. Governor,
- Member of Kiwanis Clubs in East Bay
- Past VP Finance Greater Concord Chamber of Commerce
- Past Board Member Danville Chamber of commerce
- Past Board Member Walnut Creek Chamber of Commerce
- Toastmaster Member

E. Patricia Barsotti “Patti”

- Past Board Member Kiwanis District Foundation
- Past Distinguished President Kiwanis Club of Oakland
- Elected City Treasurer of Concord-Current position – Since 2017
- Kiwanis Governor Cabinet for 2024-2025