

# Application Form

## Profile

Eswar \_\_\_\_\_ Menon \_\_\_\_\_  
 First Name Middle Initial Last Name

\_\_\_\_\_ Suite or Apt \_\_\_\_\_  
 Home Address  
 Walnut Creek CA 94597  
 City State Postal Code

\_\_\_\_\_ Primary Phone

\_\_\_\_\_ Email Address

## [District Locator Tool](#)

### Resident of Supervisorial District:

District 4

Empiric Institutional \_\_\_\_\_ Chief Investment officer/Fundamental Strategies \_\_\_\_\_  
 Employer Job Title

### Length of Employment

10 years

### Do you work in Contra Costa County?

Yes  No

### If Yes, in which District do you work?

District 4

### How long have you lived or worked in Contra Costa County?

26 years

### Are you a veteran of the U.S. Armed Forces?

Yes  No

## Board and Interest

### Which Boards would you like to apply for?

Contra Costa County Employees' Retirement Association (CCCERA): Submitted

**Seat Name**

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Board of Retirement

**Have you ever attended a meeting of the advisory board for which you are applying?**

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Yes  No

**If Yes, how many meetings have you attended?**

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**Education**

**Select the option that applies to your high school education \***

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High School Diploma

**College/ University A**

**Name of College Attended**

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University of Chicago

**Degree Type / Course of Study / Major**

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MBA/Finance/Marketing

**Degree Awarded?**

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Yes  No

**College/ University B**

**Name of College Attended**

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University of California, Santa Barbara

**Degree Type / Course of Study / Major**

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Master of Science/Electrical & Computer Engineering

**Degree Awarded?**

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Yes  No

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**College/ University C**

**Name of College Attended**

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Indian Institute of Technology, Madras

**Degree Type / Course of Study / Major**

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Bachelor of Technology

**Degree Awarded?**

Yes  No

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**Other Trainings & Occupational Licenses**

**Other Training A**

**Certificate Awarded for Training?**

Yes  No

**Other Training B**

**Certificate Awarded for Training?**

Yes  No

**Occupational Licenses Completed:**

Series 65/Investment Advisor

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**Qualifications and Volunteer Experience**

**Please explain why you would like to serve on this particular board, committee, or commission.**

I have been a resident of Contra Costa County for 26 years and would like the opportunity to assist the Retirement Fund in its long-term goals. This would be an opportunity to give back to a community that my family and I care about.

**Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)**

I have extensive educational and work experience in asset allocation, investments and oversight of investment teams. I am a Board Trustee/Board Vice-Chair at the San Jose Police & Fire Retirement Board; also a member of the Audit Committee and Chair of the Joint Personnel Committee. Previously, I served as the Chair of The Investment Committee for about six years. As the Chair and Vice-Chair of the Joint Personnel Committee, I had significant responsibilities during the hiring of a new CEO and new CIO over the last two years. I am currently a professional investment manager and work as the Chief Investment Officer of Fundamental strategies at Empiric Institutional. Over my career, I have worked at well-known Investment firms like Nicholas-Applegate Capital Management, Loomis Sayles, WHV Investments and Geneva Advisors.

[Upload a Resume](#)

**Would you like to be considered for appointment to other advisory bodies for which you may be qualified?**

Yes  No

**Do you have any obligations that might affect your attendance at scheduled meetings?**

Yes  No

**If Yes, please explain:**

Occasional travel

**Are you currently or have you ever been appointed to a Contra Costa County advisory board?**

Yes  No

**If Yes, please list the Contra Costa County advisory board(s) on which you are currently serving:**

**If Yes, please also list the Contra Costa County advisory board(s) on which you have previously served:**

**List any volunteer or community experience, including any advisory boards on which you have served.**

Food Bank volunteer

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### **Conflict of Interest and Certification**

**Do you have a familial or financial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed under the "Important Information" section below or Resolution No. 2021/234)**

Yes  No

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

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

Yes  No

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

## Please Agree with the Following Statement

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**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 that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.**

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I Agree

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### Important Information

1. This application and any attachments you provide to it is a public document and is subject to the California Public Records Act (CA Government Code §6250-6270).
2. All members of appointed bodies are required to take the advisory body training provided by Contra Costa County.
3. Members of certain boards, commissions, and committees may be required to: (1) file a Statement of Economic Interest Form also known as a Form 700, and (2) complete the State Ethics Training Course as required by AB 1234.
4. Meetings may be held in various locations and some locations may not be accessible by public transportation.
5. Meeting dates and times are subject to change and may occur up to two (2) days per month.
6. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.
7. As indicated in Board Resolution 2021/234, a person will not be eligible for appointment if he/she is related to a Board of Supervisors' member in any of the following relationships:
  - (1) Mother, father, son, and daughter;
  - (2) Brother, sister, grandmother, grandfather, grandson, and granddaughter;
  - (3) Husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepson, and stepdaughter;
  - (4) Registered domestic partner, pursuant to California Family Code section 297;
  - (5) The relatives, as defined in 1 and 2 above, for a registered domestic partner;
  - (6) Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or business associate.

# ESWAR MENON

Walnut Creek, CA 94597

## SUMMARY

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Experienced Investment Professional with business and engineering background seeking part-time intellectually engaging assignments. Extensive public fund board experience.

## EXPERIENCE

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**EMPIRIC INSTITUTIONAL/HARPER CAPITAL MANAGEMENT**  
Chief Investment Officer/Portfolio Manager

Walnut Creek, CA  
June 2016 – present

**SAN JOSE CITY POLICE & FIRE RETIREMENT FUND**  
Board Trustee/Vice-Chair; Chair Joint Personnel Committee/Member Audit Committee  
Chair Investment Committee

November 2018-present  
March 2020-February 2026

Achievements:

- Funding ratio improved significantly
- Governance goals based on best practices
- Recruited new CEO & CIO
- Excellent working relationship with City Council member representatives, Investment and Operational staff

**GENEVA ADVISORS**  
Portfolio Manager

San Francisco, CA  
January 2014 – May 2016

**WHV INVESTMENT MANAGEMENT**  
Portfolio Manager

San Francisco, CA  
April 2010 – December 2013

**DENAHİ GLOBAL INVESTMENTS/GCA**  
Portfolio Manager, Denahi Global Investments

San Francisco, CA  
January 2005 – June 2008

**LOOMIS, SAYLES & CO.**  
Portfolio Manager and co-head of International Equities Group

San Francisco, CA  
July 1999 – December 2004

**NICHOLAS APPLGATE CAPITAL MANAGEMENT**  
Portfolio Manager

San Diego/Singapore  
July 1995 – June 1999

## EDUCATION

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**THE UNIVERSITY OF CHICAGO GRADUATE SCHOOL OF BUSINESS**  
*Master of Business Administration – concentrations: Finance and Marketing*

Chicago, IL  
September 1993 – June 1995

- Graduated with high honors and GPA of 4.0/4.0

**THE UNIVERSITY OF CALIFORNIA, SANTA BARBARA**  
*Master of Science: Electrical Engineering*

Santa Barbara, CA

- Published paper titled “Degradation kinetics of GaAs-AlGaAs quantum well lasers” in the scientific journal Applied Physics Letters

**INDIAN INSTITUTE OF TECHNOLOGY, MADRAS**  
*Bachelor of Technology: Electrical Engineering*  
Awarded Institute Blues for sports and cultural activities.

Madras, India

## ADDITIONAL INFORMATION

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- Interests include squash, chess, hiking, reading, international politics and volunteer work at the Food Bank.