

Application Form**Profile**

Eswar

First Name

Menon

Last Name

Middle
Initial

Home Address

Suite or Apt

Walnut Creek

City

CA

State

94597

Postal Code

Primary Phone

Email Address

[District Locator Tool](#)**Resident of Supervisorial District:**☒ District 4

Empiric Institutional

Employer

Chief Investment
officer/Fundamental
Strategies

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

Board of Retirement

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

☐ Yes ☒ No

If Yes, how many meetings have you attended?

Education

Select the option that applies to your high school education *

☒ High School Diploma

College/ University A

Name of College Attended

University of Chicago

Degree Type / Course of Study / Major

MBA/Finance/Marketing

Degree Awarded?

☒ Yes ☐ No

College/ University B

Name of College Attended

University of California, Santa Barbara

Degree Type / Course of Study / Major

Master of Science/Electrical & Computer Engineering

Degree Awarded?

☒ Yes ☐ No

College/ University C

Name of College Attended

Indian Institute of Technology, Madras

Degree Type / Course of Study / Major

Bachelor of Technology

Eswar Menon

Degree Awarded?

☒ Yes ☐ No

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

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

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

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.

☒ I Agree

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

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

EXPERIENCE

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

November 2018-present

Chair Investment Committee

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

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

Madras, India

Awarded Institute Blues for sports and cultural activities.

ADDITIONAL INFORMATION

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