



# The City of South San Francisco

Office of the City Clerk  
400 Grand Avenue  
South San Francisco, CA 94080  
(650) 877-8518

## BOARDS AND COMMISSIONS APPLICATION

### APPLYING FOR (more than one may be selected)

<input type="checkbox"/>	<b>Bicycle and Pedestrian Advisory Committee*</b> <i>*Must be a resident of/or employed in South San Francisco</i>
<input type="checkbox"/>	<b>Conference Center Authority -Business Representative</b> <i>*Must represent a Business in South San Francisco</i> Business Name: _____
<input type="checkbox"/>	<b>Conference Center Authority -Community Representative</b>
<input type="checkbox"/>	<b>Conference Center Authority -Hotel Representative*</b> <i>*Must represent a Hotel in South San Francisco</i> Hotel Name: _____
<input type="checkbox"/>	<b>Cultural Arts Commission</b>
<input type="checkbox"/>	<b>Equity and Public Safety Commission</b>
<input type="checkbox"/>	<b>Housing Authority</b>
<input type="checkbox"/>	<b>Housing Authority Tenant Commission*</b> <i>*Must be a resident of the Housing Authority</i>
<input type="checkbox"/>	<b>Library Board</b>
<input checked="" type="checkbox"/>	<b>Measure W Citizens' Oversight Committee</b>
<input type="checkbox"/>	<b>Parking Place Commission</b>
<input checked="" type="checkbox"/>	<b>Parks &amp; Recreation Commission</b>
<input type="checkbox"/>	<b>Planning Commission</b>
<input type="checkbox"/>	<b>Traffic Safety Commission</b>

### APPLICANT INFORMATION

Full Name: Lo Annie K.  
First M.I.

Address: [Redacted] District: 4  
Street Address (Select One)  
South San Francisco CA 94080  
City State ZIP Code

Telephone: [Redacted] Email: [Redacted]



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### SUPPLEMENTAL QUESTIONNAIRE

Why are you interested in serving as a Boards and Commissions member? What do you feel you could contribute?

I have been a South San Francisco resident for almost 18 years, and worked in the private sector throughout my career. I can bring my transferrable skills and work experience from various for-profit firms and non-profit organizations in the hospitality, finance/investments, and higher education industries, as well as my global studying and working experience in France, London, Japan, Hong Kong, and Singapore, to benefit the Boards and Commissions that I will serve with a new and diverse perspective.

What qualifies you for this appointment?

\*My global work experience in the hospitality, finance/investments, and higher education industries, accumulated from entry level in my early 20's to senior executive leadership level in my late 40's to early 50's.

\*My education and professional credentials: MBA degree and Charter Financial Analyst (CFA), Charter Alternative Investment Analyst (CAIA), and Certificate in Investment Performance Measurement (CIPM)

\*My desire to contribute to the betterment of the city where I live and to improve the quality of life for SSF residents

What is your vision for growth in South San Francisco?

\*To make South San Francisco the best city to live, work, relax, and enjoy the various services, facilities and activities for its residents

\*To retain and attract both small and large businesses to stay in/come to South San Francisco, and provide job opportunities to SSF residents while contributing a good business tax revenue to our city





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### SUPPLEMENTAL QUESTIONNAIRE

What community activities are you presently involved in, or have been in the past?

- \*Completed the San Mateo County Master Composter program in 2008, and led more than 50 hours of free composting workshops in the community in 2009-2012.
- \*Completed the SSF Police Citizens Academy in 2022
- \*Complete the SSF Citizens Academy in 2023
- \*Will participate in the San Mateo County Civics 101 program from September 2024 through October 2024

Are you currently receiving any form of compensation from the City for work performed? ☐ YES ☒ NO

If yes, please explain: \_\_\_\_\_

Do you have any relatives serving on Council, Boards, Commissions, or Committees or are otherwise employed by the City of South San Francisco? ☐ YES ☒ NO

Name: \_\_\_\_\_ Position: \_\_\_\_\_ Relationship: \_\_\_\_\_

### WORK EXPERIENCE

Employer: Charles Schwab Investment Management, Inc. City: San Francisco  
Job Title: Director, Investment Performance From: 6/2000 To: 8/2022  
Oversaw a team of 17 performance analysts responsible for performance reporting results and disclosure for over \$600 billions of mutual funds, ETFs, managed accounts, and collective investment trusts investment products

Responsibilities: \_\_\_\_\_  
Provided leadership in establishing strong performance reporting and attribution review processes that meet all regulatory requirements while providing valuable insights that help drive improvements to funds and portfolios

Interacted and worked closely with sales and marketing teams, product managers, portfolio managers, operations, legal, compliance, and other investment management personnel to establish best-in-class due diligence reporting and review processes to ensure timely high quality results

Employer: AACSB International City: Singapore  
Job Title: Senior Vice President and Chief Officer, Asia Pacific From: 7/2016 To: 11/2018  
Led a team of professionals responsible for business school accreditation, membership recruitment and retention, conferences & seminars, promotion & awareness, and administration & operations in the Asia Pacific (AP) region while collaborating closely with each functional leader in the US headquarters in a matrix organization

Responsibilities: \_\_\_\_\_  
Planned, managed, and oversaw annual budget, risk management, and strategy for the AP office; Worked closely with the AP Advisory Council on developing solutions for issues that business schools or the overall higher education industry and stakeholders faced in the AP region

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### EDUCATION

School: HEC School of Management City: Jouy-en-Josas (France)  
From: 1/1999 To: 5/2000 Degree: MBA

School: University of California City: Berkeley  
From: 8/1989 To: 6/1991 Degree: BA

### DISCLAIMER AND SIGNATURE

Signature:  Date: 8/5/2024

*I certify that, to the best of my knowledge, the statements in this application are complete and true. I agree and understand that any mis-statement of material fact will cause me to forfeit all rights to appointment to a Commission, Board, or Committee with the City of South San Francisco.*

*Applications are accepted on a continuous basis and will remain valid 1 year from the date of submission. If you are selected to serve on a Board or Commission, you may be required to file an Annual Statement of Economic Interest (FPPC Form 700) and bi-annual Ethics Training (AB1234).*

### OFFICIAL USE ONLY

Submission Date: <u>08/05/2024</u>	Received By: <u>JM</u>
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