

City of Memphis



TENNESSEE

A C WHARTON, JR.
MAYOR

June 1, 2010

The Honorable Jim Strickland, Chairman
Personnel, Intergovernmental & Annexation Committee
City Hall - Room 514
Memphis, TN 38103

Dear Chairman Strickland:

Subject to Council approval, it is my recommendation that:

Cathy Simmons (Joint Appointment)

be reappointed to the Memphis and Shelby County Downtown Parking Authority with a term expiring December 31, 2015.

I have attached biographical information.

Sincerely,

A handwritten signature in black ink, appearing to read "A C Wharton".

A C Wharton
Mayor

ACW/lar

c: Council Members



City of Memphis

BIOGRAPHICAL INFORMATION APPOINTMENT TO BOARD/COMMISSION

Downtown Parking Authority
BOARD/COMMISSION

Name: Cathy Simmons Race Caucasian M F X

E-Mail Address: cathys@legacywealth.com Fax (901) 758-9007

Profession/Employer: CCO/Legacy Wealth Management

Business Address: 6800 Poplar Avenue, Ste. 101
Memphis, TN Zip 38138 Phone: (901) 758-9006

Education: MBA/Marketing 1988; BS/Business Administration 1985

Name of Spouse: Thomas W. Volinchak Number of Children: -0-

Home Address: 6673 Old Ivy Cove Phone: (901) 590-4698

City: Memphis State: TN Zip: 38119

I certify that I am a resident of the City of Memphis (Unincorporated areas and surrounding counties are not considered). Yes x or No _____ If yes, how long? 37 yrs.

Professional Organization/Associations: Financial Planning Assoc.; Estate Planning Council; Planned Giving Council; Mid-South Assoc. of Contingency Planners

Other Organizations/Association: Investment Advisor Association; The Vinings HOA

Other Interests: Adjunct Faculty - GBU

Signature Cathy Simmons Date 1/28/2010

Cathy Simmons

Summary	Investment and leadership professional with a strong background in private wealth management and regulatory compliance working in fast paced dynamic environments. Excellent communication and presentation skills with the ability to execute a variety of projects simultaneously.
Professional Experience	<p>Legacy Wealth Management Chief Compliance Officer Certified Financial Planner™ August 1, 2000 to present</p> <ul style="list-style-type: none">Plan, execute and implement the firm's compliance processes and procedures.Various management responsibilities that include performance appraisals, job descriptions, work flow analysis, coaching, recruitment and training of new staff; mergers and acquisitions. <p>American Express Financial Advisors Inc. Financial Advisor August 1991 to July 31, 2000 Various positions District Manager 1994 to 1999 Quality of Advice Leader 1994 to 1999 Client Service Model Leader 1995 to 1999 Client Assignment Leader 1996 to 1999 First Year Advisor Leader 1997 to 1999 Veteran Advisor Leader 1998 to 1999</p>
Education	University of Memphis Memphis, TN <ul style="list-style-type: none">MBA/Marketing 1988BS/Business Administration 1985
Licenses and Certificates	CFP® Certification July 2000 Currently pursuing the IACCP SM Certification
Additional Training	<ul style="list-style-type: none">Advanced training in charitable and planned giving by Renaissance Inc. of Indianapolis, INMedia relations training by MBRK Inc. of Dallas, TXAdvanced risk management training by American ExpressSeminar presentation training by American Express
Technology	<ul style="list-style-type: none">Microsoft Office (including Excel, Word, PowerPoint)Advent AxysBloomberg
Professional Memberships	<ul style="list-style-type: none">Member Financial Planning AssociationMember Mid-South Association of Contingency PlannersMember Estate Planning CouncilMember Planned Giving Council
Civic Activities	<ul style="list-style-type: none">Member NazrudinTreasurer CCC DPA BoardMember CCC Budget and Finance CommitteeMember Investment Advisor Association's Government Relations Committee Washington DC2007 Graduate of the Leadership Memphis Executive ProgramAdjunct Faculty Christian Brothers University

**MEMPHIS AND SHELBY COUNTY DOWNTOWN PARKING
AUTHORITY**

7 Member Board

(3) City & (3) County (1) Joint Appointment

6 Year Term

B. Lane Carrick (City)	M/W	12-31-09	6yr. Term
Odell Horton, Jr. (City)	M/B	12-31-10	6yr. Term
John Stokes (City)	M/W	12-31-09	6yr. Term
Cathy Simmons (Joint)	F/W	12-31-09	6 yr. Term

