

**A RESOLUTION TO APPOINT MEMBER OF THE DUNWOODY PLANNING COMMISSION**

**WHEREAS,** the City of Dunwoody is authorized by the City Charter to create boards, commissions and authorities as the Mayor and City Council deem necessary; and

**WHEREAS,** the Mayor and City Council previously adopted Chapter 2 ("Administration") of the City Code of Ordinances, which calls for the creation of the Planning Commission; and

**WHEREAS,** the Mayor and City Council had previously appointed Ed Wagner as a member of the Planning Commission with his term expiring on June 30, 2021; and

**WHEREAS,** the Mayor of the City of Dunwoody is authorized with confirmation from the City Council to appoint Ali Mahbod as a member of the Planning Commission with the following term of office:

Ali Mahbod, 3-year term .....expiring June 30, 2024

**NOW THEREFORE BE IT RESOLVED** by the Mayor and City Council of the City of Dunwoody while in regular session on November 29, 2021, at 6:00 pm that Ali Mahbod is appointed as a member of the Planning Commission of the City of Dunwoody to serve for the designated term of office.

Approved:

\_\_\_\_\_  
Lynn P. Deutsch, Mayor

Attest:

\_\_\_\_\_  
Sharon Lowery, City Clerk  
(SEAL)

# APPLICATION FOR APPOINTMENT



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4800 Ashford Dunwoody Road | Dunwoody, GA 30338  
 Phone: (678) 382-6700 | Fax: (678) 382-6701

The Dunwoody City Council believes that citizens bring valuable insights and are a skilled resource in the community. The Council encourages all citizens to consider becoming involved in the city government by serving on a Board, Commission, or Committee. Applications are accepted throughout the year.

To be considered for an appointment to a municipal board, commission, or committee, please complete and submit the following application and send it with a resume to the City Clerk, Sharon Lowery. Applications and resumes may be submitted by e-mail to [sharon.lowery@dunwoodyga.gov](mailto:sharon.lowery@dunwoodyga.gov), by fax to (770) 396-4705, or by mail to 4800 Ashford Dunwoody Road, Dunwoody, GA 30338.

**\* Applicant Information**

Name: Ali Mahbod	
Address: 1041 Perimeter Walk Dunwoody GA 30338	
Phone: [REDACTED]	Cell: [REDACTED]
Email: [REDACTED]	
Place of Employment: Truist Wealth	Occupation: AVP - )financial planner)
How long have you been a resident of Dunwoody?	3 Years 3 Months

**\* Board / Commission / Committee for which you would like to be considered**

<input type="checkbox"/> Alcohol License Review Board	<input type="checkbox"/> Development Authority
<input type="checkbox"/> Art Commission	<input checked="" type="checkbox"/> Planning Commission
<input type="checkbox"/> Audit Committee	<input type="checkbox"/> Sustainability Committee
<input checked="" type="checkbox"/> Board of Ethics	<input type="checkbox"/> Urban Redevelopment Agency
<input checked="" type="checkbox"/> Construction Board of Adjustment and Appeals	<input checked="" type="checkbox"/> Zoning Board of Appeals
<input checked="" type="checkbox"/> Convention and Visitors Bureau of Dunwoody	
<input type="checkbox"/> Design Review Advisory Committee	<input type="checkbox"/> No preference, I just want to volunteer!

**\* Interest and Experience (Please also attach or submit a resume)**

Why are you interested in serving on a board / commission / committee?
I used to be on the Board of Zoning Planning Commission (Chair at one point briefly) for the City of Kenner, LA.
<small>I enjoy government and contributing and I am one of those people who doesnt like to complain but rather get stuck in and be in a positio nto make a difference.</small>
What experience do you possess that would be of benefit to a board / commission / committee?
I use to be the Chair of the Board of Zoning plannng commission for the City of Kenner.
I also volunteered on the Board for my HOA and help with financial budgeting.
I was the former Senior VP for a club called the Crescent City Soccer Referee's Association.

**\* Terms & Conditions**

*I hereby attest that all statements and information provided in this application are true to the best of my knowledge. I understand that I may be interviewed prior to consideration for appointment.*

*I hereby agree that if appointed to serve as a member of a City of Dunwoody Board, Commission, or Committee, I will spend my time, skills, and energy on the goals and mission of the Board, Commission, or Committee including preparation for meetings. Furthermore I agree that, if appointed, my term will be governed by the By-laws of the Board, Commission, or Committee to which I am appointed.*

*I understand that if appointed, I will make an effort to attend all meetings and must attend at least two-thirds of the scheduled meetings in order to remain a member in good standing.*

Applicant's Name: Ali Mahbod	
Applicant's Signature: <i>ali mahbod</i>	Date: 06/25/2021

**Submit!**

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## Certified Financial Planner

*10+ years' success financial planning and consultative wealth management*

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Proven wealth management advisor with a variety of industry experience from working with full service firms, retirement providers, online brokerage and fintech startups. Excellent interpersonal communication skills with the ability to work with cross-functional teams to build organizational cohesion across all levels. *Areas of expertise include:*

- Investment Advice
- Wealth Management
- Financial Coaching
- Managed Account Solutions
- Mutual Funds Offerings
- Wealth Creation
- Financial Planning
- Estate Planning
- Insurance Planning
- Retirement Planning

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## Career Experience

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Truist Wealth, Atlanta, Georgia

Provided financial planning and education.

Assistant Vice President (5/2020 to Present)

- Educate and coach clients about personal finance
- Created financial plans for SunTrust now Truist clients
- Offered multiple investment solutions to Truist clients and prospects

United States Soccer Federation, Chicago, IL

Officiated higher level soccer matches.

Soccer Official (4/2004 to Present)

- Referee higher level soccer games
- Mentor youth referees
- Act as a supervisor during soccer matches

MAVS, Atlanta, Georgia

Provided business, consulting *and educational work*.

Senior Consultant (1/2019 to Present)

- Educate and coach clients about personal finance
- Work directly with business leadership to create strategic plan for client engagement

## Ali Mahbod

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SmartPath Financial, Atlanta, Georgia

*Provided personal finance education and seminars to clients and their employees.*

Senior Financial Coach (1/2019 to 6/2019)

- Transition prospects for voluntary benefits into full time clients
- Develop and presented public speaking engagements on behalf of the company
- Assisted Training Coach's and take escalations as retirement and insurance subject matter expert
- Built insurance and asset allocation care plan projects
- Mentored team of financial coaches and took client escalations as subject matter expert
- Appointed as head of the Party Planning Committee to oversee companywide social events and diversity and inclusion initiatives
- Enrolled clients to SmartPath subscription services after first free consultation call
- Improved SmartPath company products and business model with consistent thoughtful feedback that were appreciated and implemented

Financial Coach (10/ 2018 to 01/2019)

- Create Product Care Plans to roll out to coaches and clients
- Educate and coach clients about personal finance
- Work with new clients to onboard them to SmartPath
- Developed marketing strategies working very closely with marketing team to build new initiatives
- Retained business of current clients by introducing them to platforms and providing exceptional client centric service

*continued...*

## Ali Mahbod

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E\*TRADE Financial, Alpharetta, Georgia

*Consulted with retail and business clients to advise on investment management options.*

Financial Consultant (1/2016 to 5/2018)

- Sell E\*TRADE technology advisor platform to business owners/retail clients
- Maintain and build upon current relationship to cross sell additional services
- Educate clients about the industry and invest selection
- Recognize for top mutual fund sales in all of the national branches two quarters in a row
- Consistently given high feedback scores from existing clients for exceptional “white glove service”
- Competitively competed in several in branch contest constantly ranked in the top 5 of 45 advisors
- Constantly over 100 % of combined metrics which included managed account production, mutual fund production, net new assets, fixed income recommendations and robo-advisor enrollment
- Appointed as team leader for all social activities and team collaboration events. Captain of the E\*TRADE (Alpharetta site) soccer and dodgeball teams

Client Consultant / Internal Sales (6/2015 to 1/2016)

- Make over 50 outbound phone calls
- Appointed team lead and recommended by office managers to be the team’s first manager
- Engage current clients and create warm leads for Financial Consultants
- Pioneered in introducing new ways to improve team’s presentation and processes
- Recommend E\*TRADE products and services as well as investments available on platform

VALIC Financial Advisors, Atlanta, GA

*Worked on a team of advisors that built financial plans and serviced employer retirement plan participants with 403(b), 457 and general investment and insurance needs.*

Financial Advisor (10/ 2014 to 6/2015)

- Sell variety of financial services products
- Help clients in retirement to generate desired income
- Educate clients on financial planning and 403b/401k plan options
- Presented on site workshops to clients
- Held multiple on site one on one meetings

Edward Jones Investments, New Orleans, LA

*Built a book of business of financial planning clients who needed assist with retirement, wealth generation, wealth protection, income generation, college planning, insurance and savings goals.*

Financial Advisor (01/ 2011 to 5/2014)

- Advised clients on different types of investments
- Created a long-term strategy to help clients reach their financial goals
- Educated clients on multiple types of investments from annuities, stocks, mutual funds
- Recognized by the City of New Orleans Counsel for the successful operation of the first mi-city branch
- Won Ted Jones Prospecting award in 1<sup>st</sup> year for opening 120+ new accounts
- Won McKenzie Award for exceeding goals in 2<sup>nd</sup> year of production

### ADDITIONAL EXPERIENCE

Salesman (01/2001 to 1/2017) ■ M & M Imports, New Orleans, Louisiana

Student Worker/ Teaching Assistant (12/2008 to 1/2010) ■ Tulane University, New Orleans, Louisiana

## Community Involvement

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United States Soccer Federation: From 2014 to Present I work as a soccer referee. I referee youth, adult and amateur players of all levels. I was invited to participate in the referee Olympic Development Program.

FINRA Arbitrator: From 2017 to Present I was added to the FINRA arbitration roster and invited to participate as a neutral public arbitrator in industry cases related to disputes between industry professionals as well as customers.

Dunwoody Police Department: From 2019 to Present I volunteer in the Citizen's on Patrol in association with the Dunwoody Police Department. As a Citizen's on Patrol member we do residual checks, patrol as rolling dispatchers, drive marked vehicles to present a presence in the community and assist officers as instructed.

Kenner Police Department From 2011 to 2014 I assisted the Kenner Police Department as a board member on the citizen's academy as well as assisted police officers during community events.

City of Kenner Zoning and Planning Commissions From 2013 to 2014 I was appointed by the mayor to survive on the board as first a board member then as Chairman. We oversaw zoning variances request.

Mid-City Business Association: From 2012 to 2014 I worked as the Vice President to develop new initiatives for networking events for the New Orleans Mid City businesses.

Crescent City Soccer Referee's Association: From 2008 to 2014 I worked as the Senior Vice President to create and organize the association's training and event planning.

## Education & Credentials

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### *Education*

Tulane University, New Orleans, LA

BACHELOR IN SCIENCE MANAGEMENT IN FINANCE 2010

BACHELOR IN SCIENCE MANAGEMENT IN LEGAL FINANCE 2010

Graduated Cum Laude with 162.5 credit hours in 4 years

Freeman School GPA 3.740 Overall GPA 3.561

### Notable Coursework

- Investments in Equities
- Darwin Fenner Student Managed Fund
- Financial Accounting
- Analysis of Fixed Income Securities
- Commercial Bank Management
- Cases in Financial Management

Emory University School of Continuing Studies, Atlanta, GA

CERTIFICATE IN FINANCIAL PLANNING 2017

*Professional Certifications:* Certified Financial Planner CFP Board ID# 248103 (2017), Accredited Wealth Management Advisor (2016), Accredited Asset Management Specialist (2016)

*Licenses:* FINRA Series 7 CRD #5879992 (Expires May 2020), FINRA Series 66 CRD # 5879992(Expires: May 2020), Life, Health Accident State of Georgia License # 2798253 (Expires Feb 2020), United States Soccer Federation Grade 7 Referee (Expires Dec 2020)