



CITY OF ALAMEDA APPLICATION  
BOARDS/COMMISSIONS

FILED  
MAY 18 2017

Please check any Boards/Commissions which you are interested in serving on:

- Civil Service Board
- Commission on Disability Issues
- Golf Commission
- Housing & Building Code Hearing & Appeals Commission
- Library Board
- Planning Board
- Public Art Commission
- Recreation and Park Commission
- Social Service Human Relations Board
- Transportation Commission

CITY OF ALAMEDA  
CITY CLERK'S OFFICE

Please clearly print the following information:

Name: Gortler Steven  
(Last) (First) (Middle Initial)

Address: [REDACTED]

Telephone: Home: [REDACTED] Business: \_\_\_\_\_

E-mail: [REDACTED]

Occupation: Municipal Advisor Employer: self-employed

Would Board/Commission decisions conflict with your or your spouse's business or occupation? Yes  No   
If yes, please explain: \_\_\_\_\_

Qualifying Education (List schools attended and degrees obtained): see attached resume

Qualifying Experience (List prior practical experience which would qualify you for the Board/Commission):  
see attached resume

Experience serving on a City Board, Commission or Committee: none

Other Comments: I have extensive education, training and experience related to public policy and municipal finance

Applications are public information. Would you like your telephone numbers and address withheld? Yes  No   
Would you like your e-mail address withheld? Yes  No

Nominees are subject to a background investigation. Do you agree to be subject to an investigation? Yes  No

Steven Gortler 5.18.17  
(Signature) (Date)

File with the City Clerk, City Hall, 2263 Santa Clara Avenue, Room 380. Applications are valid for one year. You will be notified if appointed. Please note anyone appointment to a Board/Commission will be required to file a Statement of Economic Interests, Form 700.

**STEVEN GORTLER**



**EXPERIENCE**

**April 2013  
to present**

**Independent Registered Municipal Advisor (self-employed)**

Municipal advisor specializing in the structuring, marketing and pricing of municipal debt obligations for California cities. Bay Area clients include the cities of Albany, Clayton, Morgan Hill, Petaluma, San Pablo, Tracy and Watsonville. Responsible for managing all aspects of the bond issuance process including originating transactions; recommending an appropriate plan of finance, bond structure and method of sale; assembling and coordinating the financing team; overseeing the preparation of all financing and disclosure documents; obtaining bond ratings and credit enhancements;

**January 2012  
to April 2013**

**Caldwell Flores Winters, Inc.  
Vice President, Public Finance**

Financial advisor serving California K-12 school districts, responsible for managing all aspects of the bond issuance process including originating transactions; recommending an appropriate plan of finance, bond structure and method of sale; assembling and coordinating the financing team; overseeing the preparation of all financing and disclosure documents; obtaining bond ratings and credit enhancements; and overseeing bond pricing, closing and post-closing activities.

**July 2005 to  
Dec. 2011**

**Piper Jaffray & Co.  
Vice President, Public Finance**

Investment banker serving California cities, responsible for structuring, marketing and pricing a wide variety of municipal debt types, including fixed and variable-rate debt, public offerings and private placements, new-money and refunding bonds, special tax and assessment district bonds, tax allocation bonds and water/sewer revenue bonds. Responsible for managing all aspects of the bond issuance process including originating transactions; recommending an appropriate plan of finance and bond structure; coordinating the financing team; overseeing the preparation of all financing and disclosure documents; obtaining bond ratings and credit enhancements; and overseeing bond pricing, closing and post-closing activities.

**Sept. 2004 to  
June 2005**

**Deutsche Bank  
Underwriter, Commercial Real Estate**

Underwriter of Fannie Mae and Freddie Mac-backed multi-family housing project debt.

Sept. 1998 to  
Sept. 2004

**Leifer Capital and Kelling, Northcross & Nobriga (KNN)  
Vice President, Public Finance**

Financial advisor serving California counties, responsible for structuring, marketing and pricing a wide variety of municipal debt types, including long and short-term debt, fixed-rate and variable-rate debt, tax-backed bonds, appropriation-backed debt, enterprise fund bonds and asset-backed bonds. Responsible for managing all aspects of the bond issuance process including originating transactions, recommending financing strategies and bond structuring options, assembling and coordinating the financing team, overseeing the preparation of financing documents, obtaining bond ratings and credit enhancements, and overseeing bond pricing, closing and post-closing activities.

Jan. 1991 to  
Aug. 1998

**Standard & Poor's  
Associate Director, Public Finance**

Rated municipal bonds for State and local government agencies including GO bonds, COPs, TRANS, water, sewer, solid-waste and waste-to-energy bonds, parking bonds, pension obligation bonds, tax increment bonds, port revenue bonds, CCRC bonds, higher education bonds, multi-family housing revenue bonds and sales tax bonds. Published articles and reports on credit trends, economic trends, regulatory issues, judicial decisions, and the impact of current events on municipal credit quality.

1989 to 1990

**Economic Data Service**

Self-employed. Created a database of national, state and local economic statistics. Produced monthly reports analyzing economic and demographic trends.

1988

**Round-the-World Bicycle Trip**

1983 to 1987

**New York City Office of Management & Budget  
Senior Analyst, Tax Policy, Revenue Forecasting and Economic Analysis**

Assisted in the preparation of New York City's general fund tax revenue budget. Responsible for forecasting personal income tax revenue and sales tax revenue. Analyzed the impact of State and local fiscal policy on New York City tax revenues.

**EDUCATION**

**MS Public Policy, Carnegie-Mellon University (candidate)**

Concentration: Public Finance

**BA Economics, State University of New York at Albany**

Concentration: Public Finance

**LICENSES**

**Series 7 and Series 63 (inactive)**



# CITY OF ALAMEDA APPLICATION BOARDS/COMMISSIONS

**FILED**  
JUN 07 2017  
CITY OF ALAMEDA  
CITY CLERK'S OFFICE

Check only **ONE** of the following Boards/Commissions. If you are interested in appointment to more than one Board or Commission, please complete a **SEPARATE** form for each.

- Civil Service Board \*
- Commission on Disability Issues
- Golf Commission
- Housing & Building Code Hearing & Appeals Board\*
- Library Board \*
- Planning Board \*
- Public Art Commission \*
- Recreation and Park Commission\*
- Social Service Human Relations Board \*
- Transportation Commission\*

**FILED**  
JUN 08 2017  
CITY OF ALAMEDA  
CITY CLERK'S OFFICE

\*Appointees to these Boards/Commissions are required to complete a Conflict of Interest Statement.

PLEASE PRINT THE FOLLOWING INFORMATION:

Name: Tilos Ruben \_\_\_\_\_  
(Last) (First) (Middle Initial)

Address: \_\_\_\_\_

Home Telephone \_\_\_\_\_ Business Telephone \_\_\_\_\_

E-Mail: \_\_\_\_\_

Occupation: Financial Analyst Employer: Opes Advisors

Would decisions made by the Board/Commission conflict with your business or occupation?  Yes  No

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

List schools attended and degrees obtained

Qualifying Education: San Francisco State University - MBA Encinal High School  
Santa Clara University - BS Finance

List prior practical experience which would qualify you for the Board/Commission

Qualifying Experience: Chair, Recreation Park Commission 40+ year Alameda resident  
Commissioner, Open Government Commission

Other Comments: \_\_\_\_\_

Applications are public information. Would you like your telephone numbers & address withheld?  Yes  No  
Would you like your email address withheld?  Yes  No

Nominees are subject to a background investigation. Do you agree to be subject to an investigation?  Yes  No

Ruben Tilos 6/8/17  
(Signature) (Date)