

APPLICATION FOR APPOINTMENT

41 Perimeter Center East, Ste 250 | Dunwoody, GA 30346
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, by fax to (770) 396-4705, or by mail to 41 Perimeter Center East, Suite 250, Dunwoody, GA 30346.

* Applicant Information

Name: Rachelle Carmel		
Address: 2834 Burnham Court Atlanta, GA 30360		
Phone:	Cell:	
Email:		
Place of Employment: SunTrust	Occupation: Wealth Planner	
How long have you been a resident of Dunwoody?	8 Years	Months

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

<input type="checkbox"/> Alcohol License Review Board	<input 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 type="checkbox"/> Construction Board of Adjustment and Appeals	<input type="checkbox"/> Volunteer Coordinating Committee
<input type="checkbox"/> Convention and Visitors Bureau of Dunwoody	<input type="checkbox"/> Zoning Board of Appeals
<input type="checkbox"/> Design Review Advisory Committee	
<input type="checkbox"/> Development Authority	<input type="checkbox"/> No preference, I just want to volunteer!

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

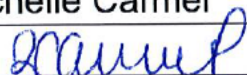
Why are you interested in serving on a board / commission / committee?
I am interested in using giving back to the community in which I live.
What experience do you possess that would be of benefit to a board / commission / committee?
I have a JD and have always been in positions where ethical behavior was a requirement of the job.
I have had to pass many background and consumer credit checks.
I have a wonderful background for this position.

* 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: Rachelle Carmel	
Applicant's Signature: 	Date: 12/20/2016

Rachelle Carmel, CFP®, CRPC®

2834 Burnham Court ☐ Atlanta, GA 30360 ☐

Financial Services Experience

Wealth Planner, SunTrust, Atlanta, GA 2016-Present

- Provide financial planning consulting and support to the wealth management teams
- Ensure high quality data collection, analysis and compilation
- Conduct client interviews and complete financial plans for clients with ultra-high net worth
- Prepare plan presentations and client seminars
- Monitor client revenues related to financial planning work to ensure opportunities are maximized
- Coach/mentor planning assistants
- Develop new clients with internal partners, external sources, and centers of influence

Registered Senior Associate, Merrill Lynch, Atlanta, GA, 2007-2013

- Worked on the highest revenue producing team that serviced Fortune 500 companies and their executives
- Created financial plans for clients
- Produced investment matrix as part of the investment committee
- Promoted banking services and products, established securities-based lines of credit and home financing solutions, and performed financial analysis on portfolios
- Executed equity, fixed income, alternative investment, and structured product orders
- Coach incoming Financial Associates on how to process business, service clients, and comply with regulations
- Create monthly reports that measure sales and corporate penetration for the Corporate Advisory Center
- Appointed as a Client Associate Coach by management

Client Relations Manager- Southern Division, AXA Advisors, Columbia, MD, 2005-2007

- Managed a team of more than 30 agents, and Conduct sales training for those associates
- Generated leads and referrals from conversations with orphan clients (a book of \$150 million) that lead to increased sales volume due to cross-selling and improved client relations for the Mid-Atlantic region of the US
- Managed client mailing program and call sessions to reconnect with existing clients
- Planned and executed client seminars
- Increased products sold by 39% year over year, accounted for 36% of division sales (normal share is 12.5%)
- Increased first year premiums 368.2% year over year, accounted for 28.4% of division premiums
- Increased Production Credits 126.5% year over year, accounted for 19.2% of division Production Credits
- Increased Cross-Sale Rate 21.7% year over year, 204.7% better than the division average

Registered Client Associate/Branch Manager Asst. / Lead Sales Asst., Smith Barney, Atlanta, GA, 2000-2003

- Processed deposits, Ensured that insurance licensing was up to date for each broker, Responsible for accounts payable for the branch office
- Prepared sales training manuals and weekly/daily sales material for brokers
- Provided sales support to teams of brokers- including opening, transferring, and managing accounts
- Planned the following programs: broker education lunches (3-4 a week), client appreciation cocktail hours, dinners, and presentations (quarterly), employee events (quarterly), and charity fundraiser (yearly)
- Completed transactions for clients

Legal Experience

Graduate Research Assistant to Trusts and Estates Professor Mary Radford, Atlanta GA, August 2014-May 2016

- Research, draft documents including excerpts for her presentations and books, and provide other assistance for Professor's projects related to Trusts and Estates

Trust and Estates Legal Assistant, Amy Yarkoni, P.C., Atlanta, GA, January 2016-April 2016

- Draft legal documents: trusts, wills, health care directives, power of attorney, and client correspondence
- Research legal matters for presentations to clients and other office projects

Rachelle Carmel, CFP®, CRPC®

2834 Burnham Court ☐ Atlanta, GA 30360 ☐

Tax Clinic Fellow, Philip C. Cook Low-Income Taxpayer Clinic, Atlanta, GA, December 2015-May 2016

Tax Clinic Student Attorney, Philip C. Cook Low-Income Taxpayer Clinic, Atlanta, GA, August-December 2015

- Research legal matters and determine methods of case resolution
- Prepare and submit Offers in Compromise, negotiate settlements & installment agreements
- Advise clients on filing requirements, help with amending and filing missed tax returns
- Write and submit Appeals notebooks, advocate clients' claims at IRS Appeals Conferences
- Quickly resolve matters of CNC status, statutory 90-day notices, federal tax liens and levies
- Prepare and submit claims for Audit Reconsideration, Collection and Deficiency Appeals
- Work to resolve liability disputes over business deductions, identity/preparer fraud, filing status, SSI lump sum payments, dependency exemptions, self-employment tax, Earned Income Credit and Child Tax credits
- Interview potential clients to determine tax issues and client eligibility
- Mentor Tax Clinic I Students

Judicial Intern to the Honorable Judge John J. Goger, Superior Court of Fulton County, Atlanta, GA, May-July 2015

- Reviewed cases designated for disposition by trial
- Researched and drafted bench memos to include a recommendation regarding resolution
- Drafted orders for Judge to execute with regard to outstanding motions
- Researched current legislation and drafted excerpts for Judge's criminal law handbook
- Assisted Judge in Court with evidentiary rulings required on cases.

Honors Law Program Intern, United States Securities and Exchange Commission, Atlanta, GA, August-December 2014

- Researched legal questions and history related to securities litigation
 - Investigated bank, phone, and other records for cases
 - Drafted memos, responses, and motions related to securities litigation cases and edited legal writing
-

Education

- **Georgia State University College of Law**
Juris Doctorate, CALI Award for Contracts II, President of Estate Planning and Wealth Management Society, and Student Liaison for Estate Planning and Probate Section of Atlanta Bar Association, Dean R. Morley Fellowship Award, Atlanta Bar Foundation's Dean Morley Award, Graduated with Pro Bono High Distinction
 - **University of Georgia Honors Program**
Bachelor of Arts in Criminal Justice, Cum Laude/High Honors Graduate, Top 15% of Class
 - **Florida Culinary Institute**
Associate in Culinary Arts, Associate in Food and Beverage Management
-

APPLICATION FOR APPOINTMENT



41 Perimeter Center East, Ste 250 | Dunwoody, GA 30346
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, by fax to (770) 396-4705, or by mail to 41 Perimeter Center East, Suite 250, Dunwoody, GA 30346.

* Applicant Information

Name: Stanley M. Baum		
Address: 4951 Lakeland Woods Court, Dunwoody, GA 30338		
Phone: (770) 390-0681	Cell:	
Email: [REDACTED]		
Place of Employment:	Occupation Attorney	
How long have you been a resident of Dunwoody?	25+ Years	Months

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

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

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

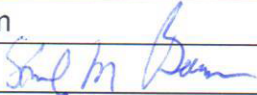
Why are you interested in serving on a board / commission / committee?
I have an interest in ethical behavior.
What experience do you possess that would be of benefit to a board / commission / committee?
I served as a member of the DeKalb County Board of Ethics for 19 years, including terms as Chair.
I am a member of the MARTA Board of Ethics.

* 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: Stanley M. Baum	
Applicant's Signature: 	Date: March 14, 2014

Submit!

Stanley M. Baum

Attorney-at-Law

4951 Lakeland Woods Court
Dunwoody, GA 30338

[REDACTED]

[REDACTED]

Home (770) 390-0681

Fax (770) 394-4820

Community Work:

Pro Hac Judge, Recorder's Court of DeKalb County
Member, MARTA Board of Ethics
Past President, Resurgens Atlanta
Past President, Congregation Shearith Israel
Past President, DeKalb Bar Association
Past President, Federal Bar Association
Former Member (Past Chairman) DeKalb County Board of Ethics
Thirty Third Degree Mason
Former Treasurer, Scottish Rite Foundation of Georgia, Inc.
Past Master, Fulton Masonic Lodge
Former Chairman, Fifth Masonic District Trial Commission
Former Member, Board of Trustees Ahavath Achim Congregation
Past Chairman, DeKalb County Georgia Republican Party
Past Chairman, Georgia 4th District Republican Party
Past President, Kiwanis Club of North DeKalb-Dunwoody
Former Assistant United States Attorney
Former Legal Aide, Georgia General Assembly
Former Member, DeKalb County Community Relations Commission
Alumnus, Leadership DeKalb
Member, Electoral College, 1988