

DATE: 4/30/2019

TO: City Clerk

FROM: Mayor Margo

ADDRESS: 300 N Campell TELEPHONE (915) 212-1051

Please place the following item on the (Check one): CONSENT X REGULAR _____

Agenda for the Council Meeting of April 30th, 2019

Item should read as follows: Appointment of Mauricio Felix to the Fair Housing Task Force by Mayor Margo.

BOARD COMMITTEE/COMMISSION APPOINTMENT/REAPPOINTMENT FORM

NAME OF BOARD/COMMITTEE/COMMISSION: Fair Housing Task Force

NOMINATED BY: Dee Margo DISTRICT: Mayor

NAME OF APPOINTEE Mauricio Felix
(Please verify correct spelling of name)

E-MAIL ADDRESS: _____

BUSINESS ADDRESS: _____

CITY: _____ ST: _____ ZIP: _____ PHONE: _____

HOME ADDRESS: _____

CITY: _____ ST: _____ ZIP: _____ PHONE: _____

DOES THE PROPOSED APPOINTEE HAVE A RELATIVE WORKING FOR THE CITY? YES: ____ NO X
IF SO, PLEASE PROVIDE HIS OR HER NAME, CITY POSITION AND RELATIONSHIP TO THE PROPOSED APPOINTEE: N/A

HAS APPOINTEE BEEN A MEMBER OF OTHER CITY BOARDS/COMMISSIONS/COMMITTEES? IF SO, PLEASE PROVIDE NAMES AND DATES: N/A

LIST ALL REAL ESTATE OWNED BY APPOINTEE IN EL PASO COUNTY (BY ADDRESS):

WHO WAS THE LAST PERSON TO HAVE HELD THIS POSITION BEFORE IT BECAME VACANT?

NAME OF INCUMBENT: George Zavala

EXPIRATION DATE OF INCUMBENT: 4/27/2021

REASON PERSON IS NO LONGER IN OFFICE (CHECK ONE): TERM EXPIRED: _____
RESIGNED X
REMOVED _____

DATE OF APPOINTMENT: 4/30/2019

TERM BEGINS ON : 4/30/2019

EXPIRATION DATE OF NEW APPOINTEE: 4/27/2021

PLEASE CHECK ONE OF THE FOLLOWING: 1st TERM: _____

2nd TERM: _____

UNEXPIRED TERM: X

Mauricio R. Felix

Employment

2007 –Present

Merrill Lynch P.F. &S. Inc.

2014-Present

Bank Financial Advisor

Responsible for client acquisition and business development. High Net worth Individual Client management, Estate planning. Liaison between Bank of America Consumer and Merrill Lynch Global Wealth Management. Problem resolution. ;

2009 –2014

Resident Director Asst.

Coordinate all staff efforts, Purchasing, monitor building maintenance issues and office operation, scheduling sales meetings, service house accounts, assist the sales efforts of a team of 17 advisors, assist with HR functions; time sheet review and approval, new hire documentation and testing.

- Assisted in the successful integration of competitive FA Recruits involving the migration of their book of business nearing \$350 mm
- Open new accounts for FA's new clients.
- Add banking features and Bank of America checking to existing clients.
- Successful dismissal of \$80mm Omnibus account deemed risky.
- Client Event organizing; recent presentation by Blackrock's Bob Doll for 100 Best clients.
- Successful recruiting of 3 Candidates now advancing in Practice Management Development program.

2007-2009

Financial Advisor

Practice management responsibilities include client acquisition and client relationship management.

- Leveraged previous work experience and network for the successful attainment of production and acquisition goals bringing 9mm along with 4mm in annuitized assets. Active participation in organizing company sponsored client events.

2003 – 2007

El Paso Unlimited Building Corp.

Vice President – Treasurer

Preside over the company's accounts, payroll functions, purchasing securing financing and assisting with client acquisition for retail home sales and new project development.

- Assessing bids from subcontractors.
- Project ROI evaluation
- Secured revolving lines of credit with private investors

Education and Licensing

1996 – 2001

I.T.E.S.M.

Business administration, bachelor degree, finance minor.

Juárez, Mexico

2000

A.B. Freeman School of Business, Tulane University

Entrepreneurship Program

New Orleans, LA

Other current licenses and memberships

- Member of National Futures Association
- Federal Reserve Bank of Dallas MSW committee
- General Securities Representative (Series 7)
- Uniform Combined State Law (Series 66)
- Commodities and Futures contracts License (Series 3)
- Member of NASD