

Commission for the Senior Community Applicant

Elliot Goldberg

Application Date: 06/12/21

Reside in Santa Monica: yes

If yes, number of years: 28

Registered to vote in Santa Monica: yes

Hold an elected position: no

If yes, please specify:

Applying for one of the seats reserved for those over the age of 60: yes

INTERESTS AND EXPERIENCE

Current or prior service on city boards/commissions:

2 terms on the Commission for the Senior Community

Community activities:

- 1) Over 10 years on Board of Trustees of Kehillat Ma'arav Synagogue in Santa Monica.
- 2) Eight years as Treasurer of Kehillat Ma'arav Synagogue in Santa Monica.
- 3) I am a CERTIFIED FINANCIAL PLANNER (TM) certificant. Since January of 2012 I have provided Pro Bono financial advice at Wise and Health Aging as part of the the FPA program.

Qualifications, experience, education, and technical or professional requirements:

BS in Physics (Wayne State University); MBA (Pepperdine University) ; Certified Financial Planner(TM) certificant; California licensed insurance agent (Accident & Health, Life-only)

Areas of demonstrated expertise:

I am a CERTIFIED FINANCIAL PLANNER (TM) certificant. Since January of 2012 I have provided Pro Bono financial advice at Wise and Health Aging as part of the FPA Financial Planning program. I also am an insurance agent. As an agent for the last 15 years (since the introduction of the Medicare part D drug plans) I specialize on matching the specific needs of seniors to the most suitable Medicare health and drug plans.

Goals:

"Giving Back": I believe a position on the Commission will enable me to be more effective than I could be as an individual in helping members of the Senior Community.

Vision:

In the immediate future identify and promote using the resources of Santa Monica to help the senior

community recover from the trauma caused by the Covid19 pandemic. Once these issues are in the past, the Commission can return to the long range goals of the mission statement..

Personal Qualities:

During my 35 year professional career in manufacturing I was responsible for the development, marketing and manufacturing of products sold to the US and foreign governments. I have also served as chair of the board of a social organization with over 2,000 members.

Will you be able to commit the necessary time to perform your duties if appointed to the board?

yes

How did you learn about the vacancy in this board or commission? (select all that apply)

Word of Mouth- Council or Board/Commission member, City Staff, neighborhood groups, etc.

BUSINESS INFORMATION

Occupation: Insurance Agent

Business name: Elliot Goldberg

Business address: 1824 Euclid Street #2

Santa Monica, CA 90404

Business phone: 310-450-3610