



Application for Appointment to Fill Vacancy
for Carlsbad City Council District 2

RECEIVED

FEB -1 2023

CITY OF CARLSBAD
CITY CLERK'S OFFICE

Applications must be received by Thursday, Feb. 2, 2023 at 5 p.m.

Rev 9:25 a.m.
TH

Requirements:

- Citizen of the United States
- Registered voter and resident of City of Carlsbad District 2
- Complete Form 700
- Attach a resume or professional biography

Personal Information

Name Steven D. Ahlquist		Date of Birth TH
Home Address		Required for Voter Registration Verification District Number 2 ✓
City Carlsbad	ZIP 92008	
Home Phone	Mobile	
E-mail		
Occupation Retired		
Employer n/a		
Employer Address n/a		
City n/a	ZIP n/a	
Work Phone n/a	Mobile n/a	

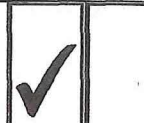
Acknowledgements

Yes No

I am a resident of the City of Carlsbad District 2.	✓	
I am a registered voter in Carlsbad.	✓	
I am a Citizens Academy graduate.	✓	
I have sufficient time to devote to the responsibility of the position and will attend the required meeting(s) if I am appointed.	✓	
I acknowledge that if appointed I will file necessary documents including a Form 700 Economic Disclosure Statement (a public record that will be posted on the City's website). I further agree to attend Ethics Training as required under the Political Reform Act and any other required trainings.	✓	

Questions? Please call 442-339-2808 or email clerk@carlsbadca.gov

I acknowledge that if appointed to fill the District 2 Council seat for a term ending with the November 2024 election, I will not be eligible to run for that seat in the November 2024 election per Carlsbad Municipal Code section 2.04.110. I further agree to abide by the provisions of this code section as it exists at the time of my appointment.



I am aware that this application is a public document.



Please describe your professional experience and relevant experience.

38 years in Financial Services - Community Banking, having been in Senior Management for ten years at three of San Diego's Premier Community Banks, Executive Director of Resource Ministry at one of San Diego's mega churches, and six years as a licensed mortgage originator.

Please describe your educational background.

I graduated from Carlsbad High School in 1969. I attended Mira Costa College and received an AA in Business Administration, AS in Police Science and received a Peace Officers Standard Training (POST) Certificate

Please describe your current or past community involvement, including any service on boards, commissions or committees, with private or public agencies.

I've been a member of Rotary International for forty-four years, as a member of four Rotary Clubs, and am currently a member of the Carlsbad Hi-Noon Rotary Club. Board of Elders for North Coast Church - 17 years, Founding/Vice Chairman: Temecula Economic Development Committee, Founding Director; Vista Economic Development Corporation, Director Tri City Hospital Foundation. President Hemet Rotary Club, Treasurer; Rotary International District 5330, Treasurer; Rotary International District Council 5340. I served as a Reserve Sheriff's Deputy for the San Diego Sheriff's Department for three years. I am currently serving as a Senior Volunteer for the California Highway Patrol for the past one year. I've been a member of the Carlsbad Chamber of Commerce, the Hemet Chamber of Commerce, and the Temecula Chamber of Commerce.

Please give examples of using collaboration to become successful.

Listening to other council members to work together to meet our goals and objectives. To help each other by sharing and developing each other's ideas. Listening to citizens needs, wants and desires to understand their position and point of view and work with council members and city staff to determine need and viability of their wants.

What are the most pressing issues facing our community and how do you plan to address them?

Growth: Understand our needs and the county and state's requirements for additional housing, and all related issues to this required growth.

Traffic: Working locally and regionally to understand issues with traffic and best solutions to solve them.

**Please explain why you wish to be appointed to City Council
(attach a separate sheet if needed)**

Having grown up in Carlsbad and owning my home in Carlsbad for the past 38 years, I have seen the city grow and prosper since 1965. I now have the time and corporate experience to dedicate to the city to help it continue to navigate through the opportunities and challenges for the next two years until an election to fill the vacancy created by Mr. Blackburn's election as mayor is filled.

Are you related to, employed by, or affiliated in any way with anyone on the City Council or City of Carlsbad staff members? If yes, please list member name(s).

No

What would you like to accomplish as a council person if appointed?

I would like to see the city continue to grow and prosper with proper planning and financing. While Carlsbad has been successful in its planning and execution to the beautiful city it has become, I realize there are many challenges it faces to keep the dream and goal of continuing to be the shining city in San Diego County. I will provide experience and insight to help accomplish the city's and citizen's goals.

Additional information or comments

Signature

By signing below, I declare under penalty of perjury under the laws of the State of California that the answers provided in this application are true and correct to the best of my knowledge.

First Name: **Steven**

Last Name: **Ahlquist**

Signature:



Date: **01/31/2023**

Signature

Completed applications must be received by the City Clerk's Office no later than Thursday, Feb. 2 at 5 p.m. Once submitted, applications cannot be amended. Remember that you must answer all questions on this application, provide a resume or biography and submit a Form 700 to be considered for the appointment to the City Council District No. 2 office. Incomplete application packages will not be considered.

Option 1: Mail or drop off the signed paper copy of your completed application with resume or professional bio and Form 700 to:

City of Carlsbad
City Clerk's Office
1200 Carlsbad Village Drive
Carlsbad, CA 92008
(442) 339-2808

Postmarks are not accepted. Applications must be received by the City Clerk's Office by the due date.

Option 2: E-mail your completed application.

Sign, date and e-mail the application with your resume or professional bio and Form 700 to: clerk@carlsbadca.gov

Steven D. Ahlquist

Summary of Qualifications

- Reverse Mortgage Loan Specialist
- Thirty-three year banking career including 14 years in Bank and Branch Administration.
- Thoroughly experienced in all aspects of branch administration, deposit and loan acquisition, marketing and business development.
- Eight years church administration handling all aspects of business and construction activities
- One year as Mortgage Loan Originator, NMLS #1036422, specializing in HECM loans.

Experience

Retired 4.19 - Present

Reverse Mortgage Loan Originator

HighTechLending Inc. 7/14 - 3-19

- Marketing local professionals servicing qualified seniors for leads for HECM clients
- Meet with loan candidate referrals to determine if HECM product is appropriate, develop proposals, applications and work with processors and underwriting to successful close of loans

Reverse Mortgage Loan Originator

Fairway Independent Mortgage Corp. 6/14 - 7/15

- Marketing local professionals servicing qualified seniors for leads for HECM clients
- Meet with loan candidate referrals to determine if HECM product is appropriate, develop proposals, applications and work with processors and underwriting to successful close of loans

Reverse Mortgage Loan Originator - Premier Reverse Solutions 4/13 – 6/14

- Marketing local professionals servicing qualified seniors for leads for HECM clients
- Meet with loan candidate referrals to determine if HECM product is appropriate, develop proposals, applications and work with processors and underwriting to successful close of loans

Vice President & Branch Manager - Silvergate Bank 1/12 – 10/12

- Successfully opened new Carlsbad Office 4/12
- Successful in meeting deposit goals
- Created marketing plan to introduce Silvergate Bank into North County Coastal community
- Oversaw branch operations to successfully receive perfect audit 10/12

Executive Director of Resource Ministry - North Coast Church 2/04 - 12/11

- Provide oversight and represent the church in all new construction and tenant improvements of \$54 million church campus
- Provide directional leadership, coaching and strategic plans for all support ministries; Human Resources, IT, Facilities, Accounting, Purchasing and Distribution, etc.

Sr Vice President/Branch Administrator - Southwest Community Bank 10/98 - 2/04

- Provide directional leadership, coaching and strategic plans for retail banking offices
- Administered facilities in development of new Bank offices, designed and supervised construction of four banking offices, and relocation of administrative and loan offices.
- Developed and Supervised Business Development Department.
- Corporate Banking officer for bank's largest customers
- Developed new deposit and financial services products and related collateral materials
- Created successful Home Owner Association Division. Created Lock Box, Cash Management.

Sr Vice President/Branch Administrator - First National Bank 10/97 – 10/98

- Re-engineered branch system on merged two-bank system
- Directed Deposit Growth resulting in \$100 million growth
- Developed Business Development Department and bank wide incentive plans
- Developed new deposit and financial services products and related collateral materials
- Successfully acquired two branch bank and merged into five branch system

First Vice President/Branch Administrator Bank of Commerce 12/89 – 10/97

- Directed Deposit Growth from \$98 million to \$414 million over three years for six-branch bank.
- Primary contact officer with State Banking Department and FDIC for branch banking matters, including new offices, closing offices, mergers, etc. Successfully merged one banking office, opened one banking office transferred two offices and closed one banking office.
- Deposit product design and development including DDA, SAV and ancillary products to develop deposit base.
- Created successful Home Owner Association Division resulting in \$40 million deposit and \$10 million loan base. Created Lock Box, Cash Management and Debit Card Services.
- Administered facilities in development of new Bank offices, designed and supervised construction of four banking offices, and relocation of four offices.
- Developed and administered incentive programs for branch officers and employees centered around deposit growth and customer service.

Regional Vice President - Southwest Bank 10/87 – 10/89

- Branch Administrator for nine branches and Business Development Division
- Administrative Credit Officer for Branches and Auto Dealer Division
- Successfully coordinated the merger of Thrift and Loan subsidiary into bank, resulting in monthly savings of \$50,000 in facility, operating costs and salary expense.

Vice President & Manager - Southwest Bank 6/79 - 9-87

Various Officer Positions - Southwest Bank 4/73 - 5/79

Community Involvement

- Rotary International. Member for 37 years in various Rotary Clubs
- Board of Elders, North Coast Church, 2 terms totaling 14 years
- Vice Chairman, Temecula Economic Development Corp. 1991 – 93
- Director, Vista Economic Development Association 1991 – 93
- Director, Tri-City Hospital Foundation 7/09 - 6/10

References available upon request.

Rev 7.1.21

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received
Filing Official Use Only

01/31/2023

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Ahlquist Steven Douglas

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

City of Carlsbad

Division, Board, Department, District, if applicable

n/a

Your Position

City Council Applicant for Appointment

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County _____

☐ County of _____

☒ City of Carlsbad

☐ Other _____

3. Type of Statement (Check at least one box)

☐ Annual: The period covered is January 1, 2022, through
December 31, 2022.

☐ Leaving Office: Date Left ____/____/____
(Check one circle.)

-or-

The period covered is ____/____/____, through
December 31, 2022.

☐ The period covered is January 1, 2022, through the date of
leaving office.

-or-

☐ Assuming Office: Date assumed ____/____/____

☐ The period covered is ____/____/____, through
the date of leaving office.

☒ Candidate: Date of Election _____ and office sought, if different than Part 1: _____

4. Schedule Summary (required)

► Total number of pages including this cover page: _____

Schedules attached

☐ Schedule A-1 - Investments - schedule attached

☐ Schedule C - Income, Loans, & Business Positions - schedule attached

☐ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☐ Schedule B - Real Property - schedule attached

☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or- ☒ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

Carlsbad

CA

92008

DAYTIME TELEPHONE NUMBER

()

EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 01/31/2023

(month, day, year)

Signature

(File the originally signed paper statement with your filing official.)