



Travis County Commissioners Court Agenda Request

Meeting Date: December 10, 2013
Prepared By/Phone Number: Sara Krause/512-854-9230
Elected/Appointed Official/Dept. Head: Commissioner Bruce Todd
Commissioners Court Sponsor: Commissioner Bruce Todd

AGENDA LANGUAGE:

Consider and take appropriate action on the reappointment of Jerry Stein to the Emergency Services District #6 Board of Commissioners for the two year term beginning 1/1/2014.

BACKGROUND/SUMMARY OF REQUEST AND ATTACHMENTS: See attached resume.

STAFF RECOMMENDATIONS: N/A

ISSUES AND OPPORTUNITIES: N/A

FISCAL IMPACT AND SOURCE OF FUNDING: N/A

REQUIRED AUTHORIZATIONS: N/A

JERRY W. STEIN
108 COPPERLEAF
AUSTIN, TX 78734
(512) 301-3310

MAJOR ACCOMPLISHMENTS

- Saved over \$500,000 by developing and implementing a new safety program in conjunction with rejection of Workers' Compensation Act.
- Saved over \$200,000 on supervision of Corporate IRS Exam.
- Earned \$100,000 in three months by negotiating an interest rate swap on \$4,500,000 fixed rate loan.
- Created a new limited partnership structure resulting in a \$500,000 Texas Franchise Tax savings.
- Strong Background in Tax, Investment Analysis and Management, Contract Negotiations, Estate Planning, Accounting Software, Cash Flow Forecasting and Management of Employee Benefits.

EXPERIENCE

1993-1994 REESE DESIGN, AUSTIN, TEXAS

Chief Financial and Operations Officer. Responsible for all financial and operational matters for a multi-million dollar design firm in the private aircraft industry. Analyzed accounting software and implemented Accpac Plus for in-house accounting needs. Restructured operating entity to a limited partnership to save a substantial amount of Texas Franchise Tax. Negotiated foreign currency forward contract for payment to European vendors.

1989-1993 LABATT FOOD SERVICE, SAN ANTONIO, TEXAS

Chief Financial Officer. Responsible for all financial matters of a \$100,000,000 food distribution company. Successfully completed a leveraged buyout, purchase of a warehouse facility in Dallas, an IRS exam and interest rate swap agreement. Developed new safety program to coincide with rejection of Workers' Compensation Act and significantly reduced the Company's insurance expense. Instrumental in planning, structuring and opening the first U.S. food distribution company in Mexico City.

1980-1989

SFD ENTERPRISES, SAN ANTONIO, TEXAS

(A holding company of a financially prominent South Texas family)

Started as Tax Accountant in 1980. Responsible for the family's tax matters, which included all federal returns for individual, partnership, trust and corporate.

Promoted to Controller in 1982. Supervised four individuals. Implemented computer software and designed budgets and cash flow reporting systems.

Promoted to Tax and Investment Manager in 1984. Duties included the managing of the real estate portfolio, oil and gas investments and the other family-related businesses. In 1986, duties included budgeting, asset planning, cash flow analysis, long range strategy and office administration. Also performed all investment analysis and contract negotiations.

1977-1980

ERNST & YOUNG, TAX DEPARTMENT, SAN ANTONIO, TEXAS

Staff Accountant. Responsible for individual, estate, trust and partnership returns. Heavy emphasis and training was placed on estate planning and trust tax returns. Gained extensive experience in client relations and helping solve their tax related problems.

EDUCATION

Texas Lutheran College, Seguin, Texas, 1974-1977
B.A. in Accounting with Honors

PROFESSIONAL

Certified Public Accountant, 1980

*NATIONAL ASSOC. OF REALTORS
TEXAS ASSOC. OF REALTORS*

Real Estate Broker's License, 1987.
AUSTIN BOARD OF REALTORS

SAN ANTONIO BOARD OF REALTORS

PERSONAL

Date of Birth: November 22, 1956

Marital Status: Married with *four* children

Health: Excellent

REFERENCES

Furnished upon request.