



APPLICATION FOR COUNTY OF ORANGE
BOARD, COMMISSION OR COMMITTEE

(FOR COUNTY USE ONLY)

Return to: Clerk of the Board of Supervisors
400 W. Civic Center Dr., 6th Floor
Santa Ana, California 92701
Email: response@cob.oc.gov
Website: <https://cob.oc.gov/>

Instructions: Please complete each section below. Be sure to enter the title of the Board, Commission or Committee for which you desire consideration and attach a resume. For information or assistance, please contact the Clerk of the Board of Supervisor's Office at (714) 834-2206. Please print in ink or type.

NAME OF BOARD, COMMISSION, OR COMMITTEE TO WHICH YOU ARE APPLYING FOR MEMBERSHIP. SEE LIST AT <https://cob.oc.gov/boards-commissions-committees/bcc-name-list-and-contact-information>

SUPERVISORIAL DISTRICT IN WHICH YOU RESIDE: First Second Third Fourth Fifth

APPLICANT NAME AND RESIDENCE ADDRESS:

Rachel		A		Owens	
First Name		Middle Name		Last Name	
[REDACTED]		Irvine		CA	
Street Address		City		State	
[REDACTED]		[REDACTED]		92620	
Home Phone Number		[REDACTED]		Cell Phone Number	
[REDACTED]		[REDACTED]		[REDACTED]	
Email Address		[REDACTED]		[REDACTED]	

CURRENT EMPLOYER: self

OCCUPATION/JOB TITLE: insurance and financial services broker

BUSINESS ADDRESS: [REDACTED]

BUSINESS PHONE NUMBER: [REDACTED]

EMPLOYMENT HISTORY: Please attach a resume to this application and provide any information that would be helpful in evaluating your application. **A RESUME MUST BE ATTACHED TO YOUR APPLICATION.**

ARE YOU A CITIZEN OF THE UNITED STATES: YES NO

IF NO, NAME OF COUNTRY OF CITIZENSHIP: _____

ARE YOU A REGISTERED VOTER? YES NO

IF YES, NAME COUNTY YOU ARE REGISTERED IN: Orange

LIST ALL CURRENT PROFESSIONAL OR COMMUNITY ORGANIZATIONS AND SOCIETIES OF WHICH YOU ARE A MEMBER.

<u>ORGANIZATION/SOCIETY</u>	<u>FROM (MO./YR.)</u>	<u>TO (MO./YR.)</u>
<u>Older Adult Advisory Commission</u>	<u>11/2022</u>	<u>present</u>
<u>Irvine Older Adult Commission</u>	<u>10/2015</u>	<u>present</u>
<u>Serving People in Need</u>	<u>01/2010</u>	<u>present</u>

WITHIN THE LAST FIVE YEARS, HAVE YOU BEEN AFFILIATED WITH ANY BUSINESS OR NONPROFIT AGENCY(IES)? YES NO

DO YOU OWN REAL OR PERSONAL PROPERTY OR HAVE FINANCIAL HOLDING WHICH MIGHT PRESENT A POTENTIAL CONFLICT OF INTEREST? YES NO

HAVE YOU BEEN CONVICTED OF A FELONY OR MISDEMEANOR CRIME SINCE YOUR 18TH BIRTHDAY? YOU ARE NOT REQUIRED TO DISCLOSE ANY OF THE FOLLOWING: ARRESTS OR DETENTIONS THAT DID NOT RESULT IN A CONVICTION; CONVICTIONS THAT HAVE BEEN JUDICIALLY DISMISSED, EXPUNGED OR ORDERED SEALED; INFORMATION CONCERNING REFERRAL TO AND PARTICIPATION IN ANY PRETRIAL OR POSTTRIAL DIVERSION PROGRAM; AND CERTAIN DRUG RELATED CONVICTIONS THAT ARE OLDER THAN TWO YEARS, AS LISTED IN CALIFORNIA LABOR CODE § 432.8 (INCLUDING VIOLATIONS OF CALIFORNIA HEALTH AND SAFETY CODE SECTIONS 11357(B) AND (C), 11360(C) 11364, 11365 AND 11550 – AS THEY RELATE TO MARIJUANA)?

YES NO

IF YES, PLEASE EXPLAIN AND ATTACH ADDITIONAL SHEETS, IF NECESSARY.

PLEASE BRIEFLY EXPLAIN WHY YOU WISH TO SERVE ON THIS BOARD, COMMITTEE, OR COMMISSION. ATTACH ADDITIONAL SHEETS, IF NECESSARY.

Extensive experience with financial and insurance needs of
older adults.

DATE: 04/14/2026

APPLICANTS SIGNATURE: *Rachel Owens*

CLERK OF THE BOARD OF SUPERVISORS USE ONLY – DO NOT WRITE BELOW THIS LINE

Date Received: _____	Received by: _____ Deputy Clerk of the Board of Supervisors
Date referred: _____	
To: <input type="checkbox"/> BOS District 1	<input type="checkbox"/> BOS District 2
<input type="checkbox"/> All BOS	<input type="checkbox"/> BCC Contact Person Name _____
<input type="checkbox"/> BOS District 3	<input type="checkbox"/> BOS District 4
	<input type="checkbox"/> BOS District 5



Rachel Owens
Financial Advisor

Focus:

Rachel has devoted herself to assisting women-owned and family owned businesses grow and pass-on their companies. As a founding member and past-President of NAWBO-OC, she helps women business owners grow their businesses. She helped found the Family Business Council at Cal Sate Fullerton as well as Succession Strategies, Inc. She has demonstrated her commitment to family-owned businesses by completing the Certified Family Business Advisor designation.

With over 30 years of experience in financial services, Rachel has a wealth of knowledge that gives her a unique perspective when working with our clients. She possesses additional expertise in real estate that she incorporates into her financial planning advice. Her financial planning practice focuses on helping family owned business owners develop the financial independence and estate plans* necessary to create a smooth business succession.

Background:

- Co-founded Tri-Circle Financial Group, 2003
- Co-founded Succession Strategies to consult with family businesses, 2001
- Small Business Administration Women Business Advocate, 2000
- Certified Family Business Specialist, American Business College, 1997
- National Organization of Women Business Owners – Orange County (NAWBO-OC) Member of the Year, 1995, 1996, 1999
- Founding Sponsor Family Business Council CA State University, Fullerton, 1994
- Founding-member NAWBO-OC Chapter, 1990
- Bachelor of Arts degree – University of California, Irvine, 1974
- Board Member Irvine Older Adults Commission -2010
- Board Member Orange County Older Adult Advisory commission – 2022
- Board Member Serving People in Need - 2015

Licenses:

- Investment Advisor Representative of LPL Financial Services
- Series 7 NASD Registration (General Securities Representative)
- Series 22 NASD Registration (Direct Participation Programs Limited Representative)
- Life, Health, Disability Income Insurance Licensed (California Insurance License #0714190)

* *Estate planning is done conjunction with your attorney, tax attorney, and/or CPA. Consult them for specific advice on tax and legal matters.*