



Chartered 1708

Office of the Mayor
Gavin Buckley, Mayor
160 Duke of Gloucester Street
Annapolis, MD 21401-2517

May 3, 2019

To: Alderpersons, City of Annapolis

From: Mayor Gavin Buckley

Re: Police and Fire Retirement Plan Commission reappointment

Pending your approval, I would like to reappoint Ms. Kathie Sulick to the Police and Fire Retirement Commission. Ms. Sulick has served on this board since 2008.

Kathie Sulick
3156 Harness Creek Road
Annapolis, MD 21403

Ms. Sulick's term will expire on 10/31/22. A copy of her resume is attached.

GB/hrr

Reviewed by: <u>Public Safety Committee</u>	
<input type="checkbox"/> Favorable	<input type="checkbox"/> Unfavorable
_____	_____
Committee Chair	Date

MARY KATHLEEN SULICK, CPA/PFS

3156 Harness Creek Road
Annapolis, Maryland 21403
410-263-1403

QUALIFICATIONS

Certified Public Accountant, licensed in the State of Maryland, since 1989.

Holds the AICPA's Personal Financial Specialist designation.

Registered Investment Advisor Representative (Series 66).

Registered Securities Representative (Series 7).

Licensed in Maryland for Life and Health Insurance.

One year and a half years as partner in Heimlantz Financial Advisors, LLC; five years as the Director of Financial Services for Heimlantz CPA's; six years as Finance Director for the City of Annapolis, one year as Assistant Director for Budgeting; six years as Budget Analyst for the City of Annapolis; one year as staff accountant for a large local accounting firm; three years as an accountant with the General Assembly of Maryland.

B.S. degree in Accounting; Magna Cum Laude; completion of 33 hours of Masters Degree work in Financial Management.

CAREER EXPERIENCE

HEIMLANTZ FINANCIAL ADVISORS, LLC November 2006 – Present
Annapolis, Maryland

Partner, Certified Public Accountant, Personal Financial Specialist (CPA/PFS)
Focused on helping high-net-worth individuals and families plan for the future to meet personal financial objectives in the areas of investment planning, tax planning, retirement planning, estate planning, income protection and asset preservation, business planning and the specialty area of elder care issues.

EDUCATIONAL BACKGROUND

UNIVERSITY OF MARYLAND

1985 - 1991

Masters of Financial Administration. Completed 33 Credit Hours.

CHRISTOPHER NEWPORT UNIVERSITY

Graduated May 1981

B.S. in Accounting, Magna Cum Laude
Dean's List, Alpha Chi Honor Society

PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants (AICPA) – Personal Financial Planning
Division (PFP)

Maryland Association of CPA's (MACPA)

Financial Planning Association (FPA) National Capital Area

COMMUNITY SERVICE ASSOCIATIONS

Hospice of the Chesapeake Board of Directors

Rotary Club of Annapolis

Ginger Cove Board of Directors, Finance Committee and Investment sub-committee

matters. Maintained historical data in sufficient detail to confidently develop trends and projections. Computerized budget reports to allow analysis to be completed in a more timely fashion. Produced special analyses as required to provide an analytical base for decision making. Attended all budget meetings and hearings as required.

HAMMOND AND HEIM, CHARTERED November, 1987 – October,
1988
Annapolis, Maryland

STAFF ACCOUNTANT

Prepared compilations of financial statements for small and medium size companies, Federal and State income tax returns, payroll records and quarterly payroll reports, both Federal and State. Extensive use of personal computer and business software.

GENERAL ASSEMBLY OF MARYLAND January, 1984 – October, 1987
LEGISLATIVE ACCOUNTING OFFICE
Annapolis, Maryland

ACCOUNTANT

Coordinated all accounting transactions affecting Legislative Accounting Office of the General Assembly. Advised on appropriateness of transactions. Prepared and monitored \$15M budget appropriation. Prepared and analyzed financial statistical reports. Reviewed, evaluated, and reconciled statewide computerized fiscal data. Supervised automated financial system data integrity; reviewed work of other accountants and bookkeepers. Served as liaison and coordinator of all financial transactions between the accounting office of the General Assembly and the Department of Fiscal Services and Legislative Reference.

UNITED STATES AIR FORCE June 1973 – August 1978

Communications Center Specialist, Communication Security Custodian, Top Secret Security Clearance

HEIMLANTZ BUSINESS & TAX PLANNING
2006

January 2002 – November

Annapolis, Maryland

Certified Public Accountant (CPA) – Director of Financial Services

Provide comprehensive wealth management and financial planning solutions to a variety of clients.

CITY OF ANNAPOLIS, FINANCE DEPARTMENT

October 1988 –

January 2002

Annapolis, Maryland

FINANCE DIRECTOR

November 1995 – January 2002

Responsible for \$48M Operating Budget and \$71M Capital Improvements Plan of the City. Perform complex administrative and professional duties in the process of directing all activities of the Finance Department, including recommending financial and administrative policy to the Mayor and City Council, scheduling, preparing and presenting annual budget, participating in strategic planning, setting Citywide accounting procedures, overseeing annual independent audit, and responsibility for managing Information Technology Department and citywide financial systems. Other areas of responsibility include risk management and self-insurance, Police & Fire pension administration, debt management, including bond sales and other tax-exempt financing; cash management, accounts payable and receivable, Citywide payroll, and utility billing, and grant administration.

ASSISTANT DIRECTOR FOR BUDGETING July, 1994 – October, 1995

Responsible for all budget related functions of the City, including anticipating conflicts and problems and initiating appropriate solutions. Served as liaison with all City departments and the Mayor and City Council on budgetary matters, including the Finance Committee of the City Council. Researched and prepared fiscal notes on all legislation of the City Council. Monitored current fiscal year operating and capital budgets and prepared monthly projection of budget status for the end of the fiscal year. Continued to perform all duties previously accomplished as Budget Analyst.

BUDGET ANALYST

October, 1988 – June, 1994

Coordinated preparation of \$35M budget and monitored performance of budget. Developed instructions for preparation of budget. Prepared revenue and expenditure projections of budget accounts. Prepared and/or reviewed budget revision requests. Produced periodic reports of current budget status, of current year budget account projections, including analysis of favorable and unfavorable variances. Advised and assisted City departments with budgetary