Profile

Which Boards would you like to apply for?

Board of Adjustment: Appointed
Centennial Authority: Submitted
City of Raleigh Board of Adjustment: Submitted
City of Raleigh Planning Commission: Submitted
Durham and Wake Counties Research and Production Service District Advisory Committee: Submitted
Greater Raleigh Convention and Visitors Bureau: Submitted
Historic Preservation Commission: Submitted
Housing Authority: Submitted
Open Space and Parks Advisory Committee: Submitted
Wake County Steering Committee on Affordable Housing: Submitted
Wake County Water Partnership: Submitted
GoTriangle Transit Citizen Advisory Committee: Submitted

Please select your first Board preference: *

☑ None Selected

Please select your second Board preference: *

☑ None Selected

Please select your third Board preference: *

☑ None Selected

Please select your fourth Board preference: *

☑ None Selected

Please select your fifth Board preference: *

☑ None Selected

Please select your sixth Board preference: *

☑ None Selected

First Name	Middle Initial	Last Name
Jeffrey		Goebel

Street Address	Suite or Apt
2613 Bembridge Dr.	

City	State	Postal Code
Raleigh	NC	27613

What district do you live in?

☑ District 7

Mobile: (919) 931-0767
Primary Phone

Business: (919) 828-2501
Alternate Phone

samhall9900@gmail.com
Email Address

Employer

Job Title

If you live in an Extraterritorial Jurisdiction Area, select Yes:

○ Yes ◉ No

In order to assure countywide representation, please indicate your place of residence:

☑ Raleigh

Interests & Experiences

Why are you interested in serving on a Board or Commission?

Work Experience

Volunteer Experience

Education

Comments

Goebel_resume.pdf
Upload a Resume

If you have another document you would like to attach to your application, you may upload it below:

Please upload a file

Demographics

[redacted]

Date of Birth

Gender *

☑ Male

Ethnicity *

☑ Caucasian

Other

How did you become aware of Wake County volunteer opportunities?

☑ County Website

If you selected "Other" above, how?

Please upload a file

ETHICS GUIDELINES FOR COUNTY ADVISORY BOARDS AND COMMISSIONS

ETHICS GUIDELINES FOR COUNTY ADVISORY BOARDS AND COMMISSIONS

By submitting this electronic application, if appointed, I pledge by my signature below that I have read and will comply with the ethics guidelines for advisory boards and commissions as adopted by the Wake County Board of Commissioners which are found at the link below.

http://www.wakegov.com/commissions/Documents/CodeofEthics.pdf

Jeffrey Goebel

2613 Bembridge Dr.
Raleigh, North Carolina, 27613
919 931-0767
samhall9900@gmail.com

WORK EXPERIENCE

JORDAN PRICE WALL GRAY JONES & CARLTON, Raleigh, NC
Attorney/Partner, Sep 2002 – Present

- 18+ years' experience with all aspects of real estate transactions and management, representing buyers and sellers in matters ranging from vacant rural lots to state forests to $600,000,000.00 multi-state industrial facilities, including:
    - contract negotiations
    - title research and curative matters
    - land acquisition, use and development pursuant to governing UDO
    - private and public financing/SBA loans
    - IRS 1031 exchanges
    - historic preservation
    - environmental regulations and remediation
    - landlord/tenant relations and commercial lease negotiations

BROCK & SCOTT, PLLC, Greenville, NC
Associate attorney, Dec 2000 – Jul 2002

- Managed Greenville law office, including staff of five.
- Responsible for firm's real estate transactions throughout eastern North Carolina.

AVERITT EXPRESS, Charlotte, NC
Logistics Specialist, Aug 1994 – Aug 1998

SERVICE MERCHANDISE, Charlotte, NC
Warehouse Manager, Mar 1993 – Jul 1994

OFFICEMAX, Charlotte, NC
Shipping and Receiving Manager, Jan 1991-Mar 1993

EDUCATION

Marquette University, Milwaukee, WI
B.A., International Affairs, 1991

University of Arkansas School of Law, Fayetteville, AR
J.D., 2000

ADDITIONAL SKILLS

- Licensed in State of North Carolina and Western District of North Carolina.
- Veteran attorney with experience gained from over 18 years of practice, including ability to navigate both the court system and the private financial industry.
- Effective communicator, skilled at interpreting law for both professionals and laypeople, including as instructor in various CLE presentations.
- Active in local bar association, including prior service in 11th District Bar Professional Responsibility and Lawyer Support Committees.

Profile

Which Boards would you like to apply for?

Durham and Wake Counties Research and Production Service District Advisory Committee: Submitted

Please select your first Board preference: *

☑ Durham and Wake Counties Research and Production Service District Advisory Committee

Please select your second Board preference: *

☑ Durham and Wake Counties Research and Production Service District Advisory Committee

Please select your third Board preference: *

☑ Durham and Wake Counties Research and Production Service District Advisory Committee

Please select your fourth Board preference: *

☑ Durham and Wake Counties Research and Production Service District Advisory Committee

Please select your fifth Board preference: *

☑ Durham and Wake Counties Research and Production Service District Advisory Committee

Please select your sixth Board preference: *

☑ Durham and Wake Counties Research and Production Service District Advisory Committee

First Name	Middle Initial	Last Name
Benjamen		Parker

Street Address	Suite or Apt
1004 Tarsnet Lane	

City	State	Postal Code
Durham	NC	27703

What district do you live in?

None Selected

Primary Phone	Alternate Phone
Home: (904) 504-3422	Home: (904) 703-0116

Email Address
bparker992002@gmail.com

Employer	Job Title
Fidelity Investments	Retirment Planner

If you live in an Extraterritorial Jurisdiction Area, select Yes:

○ Yes ⊙ No

In order to assure countywide representation, please indicate your place of residence:

None Selected

Interests & Experiences

Why are you interested in serving on a Board or Commission?

I'm interested in helping the board foster positive growth and development in the Research Triangle Park, where I'm a resident.

Work Experience

I have spent 17 years in the financial services industry. 11 years with my current company Fidelity Investments as a license financial advisor and Certified Financial Planner.

Volunteer Experience

I have a lots of experience volunteering with governmental and non-profit organization. I served on the Government Affairs Committee with ImpactJAX, the young professional board of the Jacksonville, FL Chamber of Commerce. I served on the Community Advisory Council for Community First Credit Union. I also served on the Big Leader Board, the junior board for Big Brothers and Big Sisters of NE Florida.

Education

I have bachelor of Business Administration, Marketing from University of North Florida. I also hold a MBA from Florida State University.

Comments

Benjamin_Parker_resume.pdf

Upload a Resume

If you have another document you would like to attach to your application, you may upload it below:

Please upload a file

Demographics

[redacted]

Date of Birth

Gender *

☑ Male

Ethnicity *

☑ African American

Other

How did you become aware of Wake County volunteer opportunities?

☑ Other

If you selected "Other" above, how?

Internal Referral from Fidelity Invesments VP of Government Affairs.

Please upload a file

ETHICS GUIDELINES FOR COUNTY ADVISORY BOARDS AND COMMISSIONS

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BENJAMEN J. PARKER, CFP®

1004 Tarsnet Lane • Durham, NC 27703 • bparker992002@gmail.com • (904)-504-3422

CAREER SUMMARY

Experienced professional with 15 years of experience in the financial services industry. Proficient in wealth management, retirement planning, financial planning and portfolio construction with knowledge of key estate and tax planning issues. Demonstrated the ability to manage and grow a practice of high net worth clients using effective practice management, consultative sells and customer relationship management skills.

PROFESSIONAL EXPERIENCE

FIDELITY INVESTMENTS **2018 - Present**
Dedicated Retirement Planner, Tax Exempt Market

Duties includes being the primary financial planning point of contact for employees of Duke University and Health System. Helped to advocate of the importance of maximizing their retirement benefits, providing financial wellness education and fostering the relationship between Fidelity and the Duke University HR team.

- Provide 1:1 retirement planning consultations with employees of Duke University and health system
- Host financial wellness workshop and group presentations
- Working with marketing consultant on effective ways to increase participant engagement.
- Serves as a liaison with the local Durham Investor Center to help create a one Fidelity experience, working across PI and WI.

Portfolio Specialist, Portfolio Advisory Services, **2014 - 2018**

Duties include managing a book between 500-600 households of Portfolio Advisory Services clients with assets ranging from $200k to $1MM. Primary responsibilities include development and retention of assets along with conducting annual strategic reviews to ensure the client's portfolio is aligned with their goals and priorities. Current and previous accomplishments listed below:

- Maintain ranking in the 20% of the department in asset retention and sales.
- Demonstrate the ability to enhance the customer relationship by achieving high customer experience index and net promoter scores.
- Grew assigned practice from $200 million in assets to $350 million during tenure.
- Two-time Excellence in Action winner for sales, customer satisfaction and department leadership.

Retirement Relationship Manager **2008 – 2014**

Duties include managing a book of assigned 401k participants with plans managed and record kept by Fidelity, these clients are both active and inactive employees. Responsible for helping client assess their retirement readiness by providing comprehensive guidance and holistic retirement planning.

- Provided investment consultation to ensure the client had the appropriate investment strategy to achieve their goals.
- Helped retiring participants and participants separated from service analyze their options to stay in their current 401k plan or rollover to an IRA.
- Helped clients analyze their pension buyout options and determine the best course of action for them based on their retirement planning goals.
- Averaged $24,350,050 Million quarterly of net flows into Fidelity.
- Averaged $5,322,094 Million quarterly of flows into managed accounts. (Portfolio Advisory Services)
- Maintained assets retention in the top 10% of department.
- Three-time Excellence in Action award winner for outstanding sales results, customer satisfaction and department leadership.

WELLS FARGO FINANCIAL **2007 - 2008**
Division of Well Fargo Bank, N.A.
Credit Manager, Jacksonville FL (2007 – 2008)

Responsible for the growth of branch office and district portfolio through the development of new consumer and real estate business.

- Awarded Employee of the month in April 2008 for being the top producer in the district as well as top Insurance producer.
- 2nd runner-up for Regional employee of the month in April 2008 which covers the entire state of Florida.
- Ranked in the top 5 in the district in total production. Ranked in the top 15% in the region in total production during 2008.

PRIOR EXPERIENCE

H&R BLOCK/OPTION ONE MORTGAGE **2006 – 2007**
Loan Officer, Jacksonville FL

AMERICAN GENERAL **2004 – 2006**
Division of American International Group (AIG)
Financial Representative, Jacksonville FL

CITI CARD **2002 – 2004**
Division of Citi Bank
Customer Service Representative, Jacksonville FL

PROFESSIONAL AFFILIATIONS

- Community Advisory Council (Junior Board) – Community First Credit Union
- Big Leaders Board (Junior Board) – Big Brothers Big Sisters of NE Florida
- ImpactJax – Jacksonville Chamber of Commerce
- Aspire – African-American and Latino Employee Resource Group – Fidelity Investments
- District Leadership Board – Florida Federation of Alpha Chapters
- Member - Alpha Phi Alpha Fraternity, Inc.

TECHNOLOGY SKILLS

- Experienced with Microsoft Word, Excel, PowerPoint, Outlook, OneNote and Access
- Proficient in Seibel CRM and Salesforce
- Familiar with various Financial planning, retirement planning and portfolio analyzing software.

EDUCATION

- **B.S., Marketing,** University of North Florida, Jacksonville, FL 2004
- **Master of Business Administration,** Florida State University
- Series 7, 63, 66 Licensed- 2008 Fidelity Investments
- CERTIFIED FINANCIAL PLANNER™