

Application for the Appointment of the Elective Office of the County of San Diego Treasurer-Tax Collector

This is your application for consideration of appointment of County Treasurer-Tax Collector until the election of a successor.

Read the tips below to
make sure your
application is complete.

Rafe Edward

First Name

Trickey, Jr.

Last Name

Make sure you have all the pages.

There are nine (9) total pages that make up this application, including this page. The pages are numbered in the bottom right corners.

Initial the top right corner of pages 2-9 in the "Initial Here" box. This will make sure your application stays together.

Print clearly and legibly or type your application. Doing so will speed up processing time. Unclear handwriting may cause delays.

Questions? Learn more at www.sandiegocob.com or PublicComment@sdcounty.ca.gov.

This application must be received no later than Monday, September 22, 2025, at 12 noon. See page 9 for submittal instructions.

COSD ASSESSMENT APPEALS
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Application Timeline

- | | |
|---------------------------|---|
| September 22, 2025 | Applications must be submitted to the San Diego County Clerk of the Board of Supervisors no later than 12 noon. |
| September 30, 2025 | Hearing on all applicants. Please plan to attend this meeting. |

Important Things to Know

- The questions in this application ensure you are eligible to serve as Treasurer-Tax Collector if you are appointed.
- Answer the questions to the best of your ability.
- You must attach a current resume containing, at a minimum, all employment for the past five years and a completed Statement of Economic Interest (Form 700) with your application.

Additional Required Documents

The following additional materials are also included with this application for your reference:

1. Form of Notice
2. Minute Order and Board Letter - "Filling the Vacancy of the San Diego County Elective Office of County Treasurer-Tax Collector" dated August 26, 2025
3. Board of Supervisors Policy A-105: Process to Fill Vacancies of Elected Offices other than Board of Supervisors
4. County Charter to reference applicable provisions about the Office of the County Treasurer-Tax Collector
5. Administrative Code Sections pertaining to the requirements to serve as a Treasurer-Tax Collector
6. Class Specifications of the County Treasurer-Tax Collector
7. Rules for County Treasurer-Tax Collector Regarding Incompatible Activities
8. Conflict of Interest Code for the Office of the Treasurer-Tax Collector
9. Statement of Economic Interest Form (Form 700)

How This Application Will Be Used

I understand the contents of this application will be made available to the public.

☒ **Yes, I understand**

I understand that while this application is a public document, my personal e-mail address, street address, and phone number(s) will be kept confidential to the extent authorized by law.

☒ **Yes, I understand**

A. Tell us About Yourself

First Name: Rafe Edward

Last Name: Trickey, Jr.

Current Address (where you are registered to vote)

Street Address:

City:

State:

Zip Code:

Current Mailing Address (if different than the address listed above)

Street Address:

City:

State:

Zip Code:

Contact Information

Phone 1:

Phone 2:

E-mail:

Type:

Cell

Type:

Home Landline

Have you lived at your current address for more than five years?

☒ Yes

☐ No

If no, please list your previous addresses on page 4.

If you have not lived at your current address for more than five years, please list your addresses for the past five (5) years:

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

Date From: _____ Date To: _____

Street Address: _____

City: _____

State: _____ Zip Code: _____

B. Questions to Determine Eligibility

Please check the appropriate box for each question. Applicants may be asked to verify and update information at various points in the process.

1. I am a registered voter of the County of San Diego. ☒ Yes ☐ No
2. I am a citizen of the United States and of the State of California. ☒ Yes ☐ No
3. I meet at least one of the following criteria to serve as the Treasurer-Tax Collector (pursuant to Administrative Code Section 840): ☒ Yes ☐ No
Select all that apply and attach appropriate verification.
 - ☒ Served in a senior financial management position in a county, city, or other public agency dealing with similar financial responsibilities for a continuous period of not less than three years, including, but not limited to, treasurer, tax collector, auditor, auditor-controller, or the chief deputy or an assistant in those offices.
 - ☒ Possess a valid baccalaureate, masters, or doctoral degree from an accredited college or university in any of the following major fields of study: business administration, public administration, economics, finance, accounting, or a related field, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the California State Board of Accountancy pursuant to Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code, showing that I am permitted and authorized to practice as a certified public accountant.
 - ☐ Possess a valid charter issued by the Institute of Chartered Financial Analysts showing that I am designated a Chartered Financial Analyst, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
 - ☐ Possess a valid certificate issued by the Treasurer Management Association showing that I am designated a Certified Cash Manager, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.
4. I have not been convicted of a crime that disqualifies me from holding elected office. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

Application for the Appointment of the Elective Office of the
County of San Diego Treasurer-Tax Collector

INITIAL
HERE: →

RET

5. I am able to formally assume the position not later than twenty (20) business days following the selection by the Board of Supervisors. ☒ Yes ☐ No
6. I am not involved in outside activities that may be in conflict with the functions and responsibilities of the County Treasurer-Tax Collector as listed in the Rules for Incompatible Activities for the County Treasurer-Tax Collector. *If no, please explain (attach additional sheets if necessary):* ☒ Yes ☐ No

C. Experience Qualifications

1. Attach a current resume containing, at a minimum, all employment for the past five years.
2. Provide a written statement outlining the qualifications to serve as Treasurer-Tax Collector (500 words maximum).

I possess over 30 years of experience managing institutional financial services, developing investment policies, managing investment portfolios, and developing and managing multi-million-dollar budgets.

I've served as a City Treasurer in San Diego County, overseeing the day-to-day management of a nearly \$400 million investment fund, ensuring the fund was protected, ample liquidity to meet city budgeted expenditures was maintained, and optimal investment income was generated within the parameters of prudent risk management--during my leadership tenure, investment fund return increased four-fold. Working with the City Manager, received City Council approval for, created and oversaw a multi-million-dollar IRS Section 115 trust to address the city's growing pension liability. Working with the San Diego County Treasurer-Tax Collector, received approvals for the city to invest in the San Diego County Investment Pool (SDCIP), which increased the city's investment fund return rate. While coordinating and serving as the presiding officer of the city's Citizen Investment Oversight Committee (CIOC), expanded the CIOC and diversified its membership to better reflect the city's citizenry.

I hold an earned doctorate from UC San Diego, an earned Master of Science degree from the University of Southern California, an earned Master of International Affairs degree from Columbia University in the City of New York, an earned Bachelor of Arts degree from UC Santa Barbara, and an earned Certificate in Fund Raising with a Specialization in Institutional Development from UCLA.

I served as an Economist within the International Financial Services Division of the Federal Reserve Bank of New York's International Finance Department.

I successfully completed 18 semester units of graduate-level finance, accounting, and auditing coursework at Columbia University in the City of New York and the University of Southern California.

3. Please explain the reasons for wishing to be appointed to the office of County Treasurer-Tax Collector.

During three decades of leadership, my greatest professional and personal joy has been to provide excellent public service. I was a successful and impactful appointed City Treasurer, serving a coastal city in North San Diego County. The primary reason I wish to serve as San Diego County's Treasurer-Tax Collector is that because of my successful experience as a City Treasurer in San Diego County, I know that as Treasurer Tax-Collector I will provide excellent public service and make a positive impact for all of San Diego County's stakeholders. Making a positive and enduring impact is extremely important to me.

I know this position well and I would bring to this important financial services leadership position great passion for and personal experience in opening doors to all who are motivated to enrich their lives, the highest level of commitment and an unwavering dedication to the importance of inclusive and consensus-building leadership and participatory governance. I'm committed to collegial governance, teamwork, strategic planning, long-term financial sustainability, community member success, access, equity, institutional development and advancement, innovation and creative leadership.

I'm very excited about serving as San Diego County's Treasurer-Tax Collector. I'm a transformational leader who has worked extensively in non-profit leadership, government and higher education. I've developed and successfully managed complex, multi-million-dollar annual and longer-term budgets and investment portfolios, securing financial stability and sustainability along the way. I've worked hand-in-hand with legislators, other appointed and elected government officials (including elected Boards of Supervisors and City Council members), tribal leaders, and other elected and appointed boards of directors, boards of trustees and boards of regents. I have successfully secured and maintained millions of dollars of new sources of revenue for the institutions, non-profit organizations and public entities I've served and led.

I'm communicative, collegial, always available for community meetings, punctual, highly motivated, hands-on and productive. I'm experienced in public relations and civic engagement and I'm comfortable working in varied environments. I possess strong project management skills. I'm a patient problem solver, who is open to the ideas and suggestions of others. I'm flexible but firm in problem resolution. I'm a decision maker and a team player, who is supportive of staff, and I'm service-oriented.

I've experienced and had the good fortune to overcome deficits and adversity. I'm completely committed to assuring that the service community stakeholders with whom I work are successful. To some extent, I was them. To some extent, I know them. To every extent, I see them.

Thank you for your consideration.

You are encouraged to limit your response to one page, however if more space is needed, you may attach an additional page.

D. Signature

I, Rafe Edward Trickey, Jr., as a candidate for appointment of the County of San Diego Treasurer-Tax Collector declare that all information provided on this form by me, including all attachments, is true and correct. If requested, I agree to provide written responses to any questions.

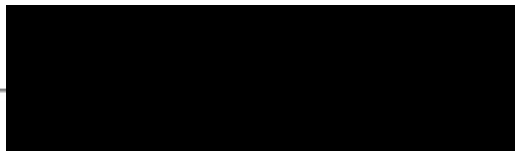
I have received the application packet and have read and understand Board of Supervisor's Policy A-105, which establishes the procedures for appointment to fill vacancies of elected offices other than Board of Supervisors, as well as the other codes and rules applicable to the County Treasurer-Tax Collector.

I understand that finalists will be subject to a full background investigation and the selected candidate will be required to pass the County's standard medical exam and full background investigation.

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

Executed on this 17th day of September, 2025, at Oceanside, California.

Signature: _____



E. Submittal

Completed applications must be received by the Clerk of the Board of Supervisors no later than Monday, September 22, 2025, at 12 noon. Double check your answers in the application; once submitted, applications cannot be amended. Remember that you must answer all questions on this application to be considered and must attach the following additional documents:

- ☒ Current resume containing, at a minimum, all employment for the past five years; and
- ☒ Completed Statement of Economic Interest Form (Form 700).

Pursuant to Board Policy A-105, all applicants must personally appear to submit the required application forms. Please submit your completed application in person to:

County Administration Center
Clerk of the Board of Supervisors
1600 Pacific Highway, Room 402
San Diego, CA 92101-2471
(619) 531-5434

Incomplete applications and applications submitted by e-mail or USPS will not be considered.

Applications must be received by Monday, September 22, 2025, at 12 noon.

Dr. Rafe Edward Trickey, Jr.



POSTSECONDARY EDUCATIONAL CREDENTIALS EARNED

UNIVERSITY OF CALIFORNIA, SAN DIEGO

Doctor of Education

Major in Institutional Leadership

UNIVERSITY OF SOUTHERN CALIFORNIA

Master of Science

Major in Policy, Planning, and Administration

COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK

Master of International Affairs

Specialization in International Finance and Banking

UNIVERSITY OF CALIFORNIA, SANTA BARBARA

Bachelor of Arts

Double Major in Political Science and History, Graduated with High Honors

UNIVERSITY OF CALIFORNIA, LOS ANGELES

Certificate in Fund Raising

Specialization in the Institutional Development Process

PRIMARY GOVERNANCE AND FINANCIAL SERVICES EXPERIENCE

Chief Executive Officer, North San Diego County Promise (07/2018 – Present)

Superintendent/President and Chief Executive Officer, West Kern Community College District/Taft College (06/2024 – 06/2025)

City Treasurer, City of Oceanside (01/2017 – 12/2018)

President, Comanche Nation College (08/2014 – 08/2016)

President and Chief Executive Officer, Sisseton Wahpeton College (09/2012 – 09/2013)

Vice President of Planning and Institutional Development and Vice President of Student Services, College of the Marshall Islands (06/2011 – 09/2012)

Executive Director of Development and External Relations, Citrus Community College District (10/2009 – 08/2010)

President and Chief Executive Officer, California Highway Patrol 11-99 Foundation (07/2003 – 07/2009)

Economist, International Financial Markets Division, International Finance Department, Federal Reserve Bank of New York (06/1988 – 08/1989)

**STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT**

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST)	(FIRST)	(MIDDLE)
Trickey, Jr.	Rafe	Edward

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

County of San Diego

Division, Board, Department, District, if applicable

Your Position

Treasurer-Tax Collector

Treasurer-Tax Collector

► 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 San Diego

☐ City of _____

☐ Other _____

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

☒ **Annual:** The period covered is January 1, 2024, through December 31, 2024.

-or-

The period covered is ____/____/____, through December 31, 2024.

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

☐ The period covered is January 1, 2024, through the date of leaving office.

-or-

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

☐ **Assuming Office:** Date assumed ____/____/____

☐ **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)				

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 09/16/2025

(month, day, year)

Signature

SCHEDULE B
Interests in Real Property
(Including Rental Income)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
Rafe Edward Trickey, Jr.

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

3378 Tournament Drive

CITY

Oceanside

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☒ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☒ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ Yrs. remaining ☐ _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

3592 De Luz Heights Road

CITY

Fallbrook

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☒ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24
ACQUIRED DISPOSED

NATURE OF INTEREST

- ☒ Ownership/Deed of Trust ☐ Easement
☐ Leasehold _____ Yrs. remaining ☐ _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

☐ Guarantor, if applicable

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

☐ Guarantor, if applicable

Comments:

SCHEDULE C
Income, Loans, & Business
Positions
(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name Rafe Edward Trickey, Jr.

▶ 1. INCOME RECEIVED	▶ 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME West Kern Community College District	NAME OF SOURCE OF INCOME City of Oceanside
ADDRESS (Business Address Acceptable) 29 Cougar Court, Taft, CA 93268	ADDRESS (Business Address Acceptable) 300 North Coast Highway, Oceanside, CA 92054
BUSINESS ACTIVITY, IF ANY, OF SOURCE Public Community College District	BUSINESS ACTIVITY, IF ANY, OF SOURCE Municipality
YOUR BUSINESS POSITION Superintendent/President and CEO	YOUR BUSINESS POSITION Chief Assistant City Attorney (Spouse)
GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> OVER \$100,000	GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input checked="" type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)	CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input checked="" type="checkbox"/> Salary <input checked="" type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD	
<p>* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:</p>	
NAME OF LENDER*	INTEREST RATE
_____	_____% <input type="checkbox"/> None
ADDRESS (Business Address Acceptable)	TERM (Months/Years)
_____	_____
BUSINESS ACTIVITY, IF ANY, OF LENDER	SECURITY FOR LOAN
_____	<input type="checkbox"/> None <input type="checkbox"/> Personal residence
HIGHEST BALANCE DURING REPORTING PERIOD	<input type="checkbox"/> Real Property _____ Street address
<input type="checkbox"/> \$500 - \$1,000	_____
<input type="checkbox"/> \$1,001 - \$10,000	City
<input type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> Guarantor _____
<input type="checkbox"/> OVER \$100,000	<input type="checkbox"/> Other _____ (Describe)

Comments: _____