



**City Council Special Meeting  
January 24, 2024  
Council Chambers  
6:00 PM**

**Agenda**

- 1. Call to Order**
- 2. Roll Call**
- 3. Election: City Council Ward 2, Seat B Candidate Statements\***
  - 3.1 Carlton Cooper P. 3**
  - 3.2 Raymond Turner P. 5**
  - 3.3 Rachel Lawrence P.7**
- 4. Adjournment**

**\*Statements received as of publishing on January 19, 2024. Deadline for submission is 9:00 AM on 1/24/24**

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City Clerk's Office

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City of Rochester, New Hampshire  
OFFICE OF THE CITY CLERK  
31 Wakefield Street • Rochester, NH 03867  
FAX (603) 509-1915 PHONE (603) 332-2130

**STATEMENT OF INTEREST  
BOARD AND COMMISSION MEMBERSHIP**

DESIRED POSITION: City Council Ward 2 Seat B

NEW  RE-APPOINTMENT \_\_\_\_\_ REGULAR \_\_\_\_\_ ALTERNATE \_\_\_\_\_

FIRST NAME: Carlton LAST NAME: Cooper

STREET ADDRESS: 15 Howe St.

ZIP: 03867

TELEPHONE: (H) (617) 947-6722 (W) \_\_\_\_\_ E-MAIL cwcooper20@yahoo.com

*Please note: Any and all information provided on this form will become subject to disclosure and made publicly accessible.*

REGISTERED VOTER: (CIRCLE ONE) YES  NO \_\_\_\_\_ WARD 2

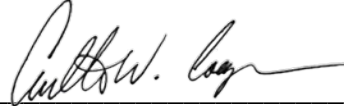
Statement of Interest/Experience/Background/Qualifications, Etc. (This section need not be completed, but any information provided will be given to all City Councilors and will be available for public inspection). (Additional sheets/information may be attached, if desired; please do not write on the back of this form.)

My intention is to represent the taxpayers to ensure that our cities needs are being met. Being fair, open, and honest in how we conduct business while working together is crucial for the future of our city. I am confident that I will represent Ward 2 & the citizens of Rochester while still maintaining my beliefs and values. The city budget, drug problem / homelessness, economic development and getting our citizens more engaged will be areas of focus as a councilor.

If this is an application for reappointment to a position, please list all training sessions you have attended relative to your appointed position.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I understand that: (1) this application will be presented to the Rochester City Council only for the position specified above and not for subsequent vacancies on the same board; (2) the Mayor and/or City Council may nominate someone who has not filed a similar application; and (3) this application will be available for public inspection.

I certify that I am 18 years of age or older: 

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City Clerk's Office

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CITY CLERK'S OFFICE  
ROCHESTER, NH

STATEMENT OF INTEREST  
BOARD AND COMMISSION MEMBERSHIP

DESIRED POSITION: CITY COUNCILOR (WARD 2)

NEW  RE-APPOINTMENT  REGULAR  ALTERNATE

FIRST NAME: RAYMOND LAST NAME: TURNER

STREET ADDRESS: 15 HEMLOCK STREET

ZIP: 03867

TELEPHONE: (H) (603) 332-2790 (W) \_\_\_\_\_ E-MAIL RTURNER0606@AOL.COM

Please note: Any and all information provided on this form will become subject to disclosure and made publicly accessible.

REGISTERED VOTER: (CIRCLE ONE)  YES  NO WARD 2

Statement of Interest/Experience/Background/Qualifications, Etc. (This section need not be completed, but any information provided will be given to all City Councilors and will be available for public inspection). (Additional sheets/information may be attached, if desired; please do not write on the back of this form.)

LONG-TERM RESIDENT OF ROCHESTER (~25 YEARS)  
ACTIVE IN THE COMMUNITY AS A 3-TERM SCHOOL BOARD MEMBER AND  
MODERATOR FOR WARD 2  
DECADES OF BUSINESS MANAGEMENT + MANUFACTURING EXPERIENCE

If this is an application for reappointment to a position, please list all training sessions you have attended relative to your appointed position.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I understand that: (1) this application will be presented to the Rochester City Council only for the position specified above and not for subsequent vacancies on the same board; (2) the Mayor and/or City Council may nominate someone who has not filed a similar application; and (3) this application will be available for public inspection.

I certify that I am 18 years of age or older: Raymond Turner

**Raymond Turner**  
 15 Hemlock Street  
 Rochester, New Hampshire 03867  
**603-332-2790**  
[rturner0606@aol.com](mailto:rturner0606@aol.com)

## HIGHLIGHTS OF QUALIFICATIONS

- ◆ Long-term Rochester resident (~25 years), whose three children graduated from the Rochester school system.
- ◆ Volunteered as a math tutor at Rochester Middle School.
- ◆ Active in the community as a 3-term School Board Member and Moderator for Ward 2.
- ◆ Decades of business management and software & hardware manufacturing experience.

## RELEVANT SKILLS AND EXPERIENCE

- Solid understanding of the Rochester School District policies and procedures.
- Management expertise in leadership, project management, conflict resolution, coaching, ...
- Basic knowledge of financial processes.
- Collaborative and comfortable working in or leading small teams.
- Appreciate diverse opinions and comfortable with healthy conflict.
- Results focused with an emphasis on impactful measures of success.

## ROCHESTER HISTORY

2020 - Present	MODERATOR, Ward 2
2014 - 2019	SCHOOL BOARD, Ward 2

## EMPLOYMENT HISTORY

2006 - Present	CISCO SYSTEMS, Boxborough, Massachusetts <b>Software &amp; Hardware New Product Program Manager</b> <b>Manufacturing Engineering Manager</b>
2000 - 2006	SUNTRON/CELESTICA/FLEXTRONICS, New Hampshire <b>Quality Assurance Manager &amp; Supplier Quality Engineer</b>
1995 - 2000	CABLETRON SYSTEMS, Rochester, New Hampshire <b>Advanced Process Development &amp; Quality Assurance Manager</b>
1992 - 1995	TRW, Transportation Electronics Division, Marshall, Illinois <b>NPI &amp; Advanced Process Development Manager</b>
1987 - 1992	DIGITAL EQUIPMENT CORPORATION, Augusta, Maine <b>Senior Manufacturing Engineer</b>

## EDUCATION

Master of Business Administration	Plymouth State College, Plymouth, New Hampshire
B.S. in Industrial Engineering Tech	University of Southern Maine, Gorham, Maine

R. Lawrence  
3 Broad Street  
Rochester, NH 03867

City Council  
City of Rochester, NH  
31 Wakefield Street  
Rochester, NH 03867

To the Members of the City Council of Rochester, NH:

I am writing this letter to apply for the vacant role of Councilor on City Council for Ward 2. As a dedicated and passionate resident of Rochester's Ward 2, my unique perspective and qualifications make me the ideal candidate for this position.

While looking for places to live in 2005, a year after completing my bachelor's degree in finance at Bentley University, I was immediately drawn to Rochester's affordability, access to nature, and sense of community. Although I briefly left for work and family obligations, I intentionally returned to Rochester in 2015, purchasing a home on Broad Street in Ward 2. I wanted to provide my young children with an ideal environment to grow up in – a vibrant neighborhood where they can freely play, interact with others, and develop lasting friendships. The Broad Street neighborhood embodies these qualities and more.

Throughout my nearly 20 years in Rochester, I have closely followed the challenges our city faces, particularly in the areas of housing and business development. I have actively volunteered at the Strafford County homeless shelter and recently joined the Warming Center as a volunteer. I have contributed to local organizations such as the NH Mutual Aid Relief Fund and Hope on Haven Hill. I have also helped unhoused Rochester neighbors access social services and find stable housing. I have organized successful community events for my neighbors, fostering a sense of camaraderie and encouraging neighbors to state their needs and help each other out. I am aware of the pressing issues regarding business development facing our city, such as revitalizing our downtown, attracting industry through workforce housing, development of retail sites like Hanson Street or the Ridge, adding housing with services for seniors such as the new EasterSeals housing, and the impending closure of the Waste Management site in several years.

In addition to my community involvement, my professional background makes me well-suited for the role of City Councilor. As outlined in my resume, I have served as a board member for several local and national nonprofits, gaining valuable experience in consensus-building, committee work, and adhering to Robert's Rules of Order. As a self-employed business owner, I work on the cutting edge of finance and operations, using innovative technology and community-based solutions to make high-quality financial advice accessible to millions of

Americans who previously did not have access. With a summa cum laude bachelor's degree in finance and a Master's degree in financial planning, I have a strong analytical and economics skill set, enabling me to conduct thorough financial analyses to inform decision-making. Throughout my career, I have consistently maintained cost-neutrality or profitability for each line of business I lead, even during the early stages of business development.

My approach to decision making combines both compassion and data-driven analysis, while always ensuring fiscal responsibility. In my personal life and as a business owner, I have held leadership positions that require active participation, objective decision making, and a willingness to consider multiple perspectives. I am open to changing my stance when presented with compelling evidence. Moreover, my public speaking experience and exceptional communication skills give me the ability to effectively convey ideas and engage with others.

Now is the time for me to get more involved in my local community as part of the Rochester City Council. I strongly believe Ward 2 voters deserve to have someone in their vacant City Council seat with a similar viewpoint and concerns for our unhoused neighbors as the candidate they voted to elect last November. As my children grow older and require less of my time, I have intentionally made space in my schedule to take on the responsibilities of a City Councilor. I am committed to using our city's resources wisely and finding innovative, humane solutions to address the issues we face. By bringing fiscal responsibility and a fresh perspective to the table, I am confident that I can contribute significantly to the Rochester community.

I am passionate about the future of Rochester, and I am eager to play an active role in ensuring that our city remains an exceptional place to live, work, and play. It would be an honor to serve as a City Councilor for Ward 2 and work towards the continued success of our community.

Thank you for considering my application.

Sincerely,

A handwritten signature in black ink that reads "Rachel Lawrence". The signature is written in a cursive style with a long horizontal flourish at the end.

Rachel Lawrence



# Rachel Lawrence, CFP®, MSFP

3 Broad St, Rochester, NH 03867 [sanborn.rb@gmail.com](mailto:sanborn.rb@gmail.com)

(603) 205-9398

## Summary

I'm passionate about money ideas that work in the real world, tackling systemic issues in ways that can be both good for the world and good for our bottom lines, and having fun while doing it all.

## Experience

### Programming Committee member

Financial Planning Association of New England, Apr 2017 - Present

### Volunteer

Warming Center of Strafford County, Jan 2024 - Present

### Founder and Financial Planner

Reverie Wealth, Aug 2022 - Present

I help women and their allies with all aspects of personal financial planning as a Registered Investment Advisor in the state of NH: budget and cash flow management, paying down debt, saving and investing towards a wide variety of goals, risk management, tax strategies, and estate planning.

### Founder & Principal

Plan Ventures, May 2022 - Present

I consult with financial companies on how to dramatically grow financial planning capabilities through technology and I write/lead workshops on financial topics. Recent projects include:

#### *Monarch Money:*

- Wrote a software program to automatically determine how to use leftover income towards financial goals

#### *Uprise:*

- Advised on how to use technology (including AI), processes, and management to grow financial planning services and maintain high quality in financial plans

#### *SoFi:*

- Drafted 2-3 workshops per quarter for their workplace financial wellness program on a variety of financial topics including organizing money, budgeting, buying a home, and more

#### *Neighborhood Trust Financial Partners:*

- Ran a full evaluation of their TrustPlus coaching program to find efficiencies and made recommendations to increase the number of clients served without increasing the size of the team

- Created and led an "impact weighted coaching" training curriculum for the financial coaching team, in order to make bigger impacts on more clients in less time

### Director Of Coaching, Dec 2018 - May 2022

### Lead Financial Planner and Subject Matter Expert, Apr 2018 - Dec 2018

#### Ellevest

- Built a >\$1m business line from the ground up over 3 years

- Managed the budget for business line, including >800% growth of ARR (annual recurring revenue) from 2018-2022 and >800% in quarterly average sales from 2020-2022; ensured costs<revenue

- Ran data analysis for coaching business and interpreted the results for key stakeholders to inform business strategy

- Created a predictive staffing model for coaching team

- Hired and trained >15 employees; directly managed 10 full time employees and 9 consultants

- Coordinated and/or led more than 300 in-person or virtual workshops
- Owned financial planning risk for all of Ellevest
  - Sat on Risk Management committee with 7 other risk owners as part of official compliance work; met bi-weekly with CCO to review new or ongoing risks, steps to mitigate risk, and review and create processes to correct audit findings
  - Created robust financial planning guidelines for company-wide use and led a committee to constantly review and update guidelines based on new evidence
  - Implemented new financial planning software, advice standards, and call guidelines firm-wide
- Interviewed by numerous national publications (Business Insider, Cosmopolitan, CNBC, etc.) and podcasts on behalf of Ellevest
- Oversaw due diligence/vetting process for third party partners and worked cross-functionally with marketing and growth teams to implement new partnerships with clients

### **Director Of Financial Planning and Subject Matter Expert**

Advizr, Oct 2016 - Mar 2018

- Led the development of Advizr's financial planning philosophy and the advice provided by their software; presented live and virtually on this topic to key decision makers alongside C-suite executives
- Strategized with executives and senior managers on new product offerings and helped determine priorities for our development roadmap
- Launched and managed a full customer support team from the ground up, including hiring, training and mentorship, implementation of support technology and analytics, workforce management, and setting up streamlined support processes for more efficient and higher quality customer support

### **Board member, Communications/Branding chair**

The Freedom Cafe (Durham, NH), Aug 2017 - Aug 2020

- Responsible for developing the brand identity and clearly communicating the Freedom Cafe's anti-human trafficking mission to our community, volunteers, and supporters
- Led board discussions on organization-wide budgeting and spending priorities, including providing financial analyses of options for effective impact

### **Head of User Acceptance Testing/App Support**, Dec 2015 - Oct 2016

### **Senior Financial Planner & Subject Matter Expert**, Sep 2012 - Oct 2016

### **Training & Development Manager**, Aug 2013 - Oct 2014

LearnVest/Northwestern Mutual

- Created and managed a support team for the users of our proprietary software
- Created and distributed firm-wide standards for financial planning advice, which were used with 40,000+ employees across Northwestern Mutual
- Spoke at multiple live events on various personal financial topics while representing LearnVest and Northwestern Mutual, engaged with the media to provide content and quotes on a wide variety of personal finance topics (quoted in Forbes, Business Insider, Fox Business, Market Watch, Financial Planning magazine, Investment News, The Fiscal Times, and more)
- Lead developer of proprietary financial planning software, including programming/coding, ensuring quality of advice and calculations, maintaining and updating software, and training/delegating maintenance to new support employees
- Launched a new branch office, including support structures for personnel and operations, creating job postings, hiring and terminating employees, technology and physical infrastructure, etc.
- Managed trainees for their first 6 months of employment, including semi-annual performance reviews, weekly 1:1 discussions, overseeing work product and client interactions, KPIs, and more

**Board member, Programming Committee chair**

Financial Planning Association of Northern New England, Sep 2011 - Aug 2014

**Volunteer**

Homeless Center for Strafford County, Sep 2009 - Sep 2010

**Treasurer**

National Guard Family Support - FRG, Sep 2009 - Feb 2011

- Treasurer and fundraising chair for the Family Readiness Group of the 172nd Mountain Infantry - Charlie Company, based in Milford, NH

**Financial Planner, Research Analyst, and Chief Compliance Officer**

Financial Focus, Inc., Oct 2007 - Aug 2012

- Used the CFP® six step personal financial planning process for a wide range of clients
- Developed new sources of business by meeting with centers of influence, obtaining referrals from existing clients, attending networking events, and having original content published.
- Researched and performed due diligence on rotating sectors of mutual funds, including small and mid cap equities, international equities, balanced funds, socially responsible funds, and high yield corporate bonds.
- Served as Chief Compliance Officer for 4 years; implemented and maintained compliance with all applicable regulations.

**Mentor**

Newfrontiers USA, Jun 2006 - Aug 2009

- Ran a Friday night program for at-risk preteens and teenagers in the Lafayette Street neighborhood of Rochester, NH, which included various games, activities, crafts, food, and a short discussion about lifestyle choices

**Branch Operations Manager/Business Development**

Commonwealth Financial Network, Dec 2005 - Sep 2007

**Performance Analyst**

Prime Buchholz LLC, May 2005 - Dec 2005

**Operations Manager**

Lincoln Investment, May 2003 - Apr 2005

**Associate**

Ameriprise Financial Services, LLC, May 2002 - Dec 2002

**Education**

**Bentley University - McCallum Graduate School of Business**

Master's Degree, Personal Financial Planning, 2017

**Bentley University**

BS, Finance, Summa Cum Laude, 2004

**Boston University**

Certificate, Financial Planning, 2011

**Fiduciary360**

Certificate, Fiduciary Studies and Prudent Practices