



2024 I'On Assembly Board of Trustees Application

Name: Robert "Bob" W. Adams

Address: 35 Eastlake Road

Email: rwa.va.sc@gmail.com

Phone: 703-424-0102 (cell)

A. Have you attended or called into a Board meeting this year? If so, when?

I have been physically present at or called into every Board meeting this year, including all regular and executive session meetings.

B. Professional and Educational Background (summarized)

Professional/work history

June 1973-May 2015: Patent and trademark litigation lawyer, initially as a law clerk and an associate, until I became a partner from about October 1980 to November 30, 1986 with Cushman, Darby & Cushman (later merged into larger law firms); and, after December 1, 1986, partner/shareholder with Nixon & Vanderhye. I retired on May 5, 2015.

2001-August 2023: Director, Diffusion Pharmaceuticals, until its merger with CervoMed Inc. (CRVO) in August 2023.

Educational background

1972, University of Maryland, B.A.

1975, George Washington University Law School, J.D. (with honors)

Any notable accomplishments/awards/recognition

As a result of my civic activities in Fairfax County, Virginia, the Fairfax Board of Supervisors honored me with the Lord Fairfax Award (for outstanding volunteer service activities for the county government and community). My unpaid government appointments include, inter alia, being a Commissioner on the Fairfax County Transportation Advisory Commission as well as being a member on the Tysons Corner Task Force (i.e., extending the Metro system to Dulles Airport) and the Hunter Mill Road Traffic Calming Committee.

Also, I am proud of my work in connection with the preservation of the Oakton Schoolhouse (circa 1900) and its move to the Oakton Community Park, along with personally obtaining a significant endowment from local businesses to maintain the schoolhouse.

In addition, I was one of the leaders of Options for Oakton. For 7 years, that group vigorously fought a proposed 120+ townhouse development in Oakton and our opposition resulted in a development with 58 single-family homes and the construction of the Oakton Public Library.

Finally, I coached numerous youth sports teams – primarily elementary and middle school lacrosse teams.

Volunteer activities outside I'On and/or before moving to I'On.

Please see the above.

Your relevant skills (e.g., financial, legal, communications, computers/internet, etc)

I was the lead litigation attorney on more than 70 intellectual property lawsuits, including at least 20 large intellectual property lawsuits and at least 6 world-wide cross-licensing negotiations involving complex technical issues.

During my tenure with two firms, I was a Director at those two firms for at least 6 terms. Also, at Nixon & Vanderhye, I was on the Finance Committee and I organized/ran the firm's 401K program from 1987 to 2015.

With Diffusion, I was the Chair of the Compensation Committee, a member of the Nominating & Governing Committee and a member of the Audit Committee (until 2022, when committee membership was restricted to two committees).

C. HOA Involvement

Do you have prior experience on an HOA board?

Most of the time that we lived in Northern Virginia, we did not live in a community having an HOA.

We purchased our home in I'On on 12/23/19. I joined the I'On Finance Committee in about mid-2021. I was elected to the I'On Assembly Board in January 2022. I have served as Treasurer and the Finance Committee Chair since then.

Can you attend regular monthly Board meetings?

Yes.

Can you devote 5 to 10 hours per month to fulfill your Trustee responsibilities?

Yes.

What Board Committee interests you?

My primary interests are in leadership and/or financial roles.

D. I'On Involvement

How long have you lived in I'On?

We purchased our I'On home on 12/23/19.

Please list the I'On Activities that you participate in:

In addition to the I'On Assembly Board activities discussed above, I have been a member of I'On At Home for several years and have enjoyed many of its activities.

Please describe your I'On volunteer activities:

See my I'On committee and Board experience discussed above.

E. Issues, positions, goals, etc

What do you think are the top 3 issues facing the Assembly in the coming year, and how would you address them as a Board member?

First, bearing in mind the long-term financial needs of l'On, I support setting aside sufficient funds in both the operating fund and the reserve fund to ensure that l'On's needs can be adequately addressed every year. This is a continuing process. I am strongly opposed to raising annual fees dramatically or to raising large amounts of money via a special assessment.

During my 2-year tenure as a Trustee/Treasurer, the money in the reserve fund (excluding the strategic fund) has increased from approximately \$1.5M as of 12/31/21 to about \$2.6M as of about 10/31/23. Putting this into perspective, when I joined the Board in January 2022, our reserve funding was at about 75% of what our independent consultants (MillerDodson) said was needed. By the end of 2023, the reserve fund should be just over 100% of what these consultants say we need at the end of this year.

However, this does not mean that there is no need to make further annual reserve fund contributions. Every year we spend significant reserve fund money to meet then-current replacement expenses for our infrastructure (e.g., paths, bulkheads and existing structures), to address continuing inflation for future replacement costs and to build up a sufficient reserve for disasters and the like. In its semi-annual review in mid-September 2023, MillerDodson recommended that the Board provide \$300K in new reserve funding in the 2024 budget to replenish yearly expenditures and to meet those types of future reserve fund expenses. This money is included in the approved 2024 budget.

Finally, when I joined the Board in January 2022, the prior Board had just created a strategic fund to pay for the buy-out of the Creek Club lease. As of 9/30/23, the Reserve Fund Balance Sheet showed that this buy-out fund climbed to about \$271,000 in just about 14 months. Significantly, because of the recent Walbeck litigation award, the full amount of the buy-out money (\$1M) is now set aside for that purpose in the re-named Creek Club Lease Termination fund.

Although the lease buy-out is currently scheduled for February 2034, it is possible that 148 Civitas may accept a buy-out before that time. Thus, it is important to have this money set aside and available now and in the future.

Second, I have always vehemently opposed an active cemetery at any location in l'On. I will not change my position on this issue.

Third, it is essential to reign in unnecessary legal expenses. The Board set a 2023 legal budget of \$80,000. However, that budget likely will be exceeded by about \$70,000 in 2023. The majority of the excess legal fees (about \$60,000 or more) was spent as a result of demands by some Titleholders for the Assembly to file a meritless lawsuit relating to CV-9 and, later, to defend against threats of legal action against the Board and its individual members. The Assembly's legal counsel provided an opinion stating that no factual or legal grounds exist for the proposed CV-9 lawsuit.

Why do you want to be on the Board of Trustees? What are your goals and objectives as a Trustee?

I have always felt that it is important to "give back" to my community. I have served l'On for two years and I hope to continue that service.

The Board of Trustees functions best when homeowners are involved and informed. Good decisions are based upon learning the actual and complete facts. I would like to see better attendance at the monthly Board meetings by Titleholders, so ideas can be exchanged in a positive and neighborly fashion -- as opposed to anonymous emails.

Finally, one of the many benefits of l'on is that its age demographics are very broad. For that reason, I want to ensure that there are superlative facilities for all residents -- from our most elderly residents to our neighborhood children.

What else would you like to the community to know about you?

I intend to spend the rest of my life in l'On and, for that reason, I have made a long-term commitment to serve our community.

My "style" is to work toward consensus decision-making. My honesty and integrity are an essential part of my character.

Accordingly, I promise to listen with an open mind; to investigate the facts before making comments; to provide factual, honest and thoughtful responses; and to act at the highest level of integrity bearing in mind my fiduciary duty to the l'On community.



2024 I'On Assembly Board of Trustees Application

Name: Michael Koon
Address: 47 Robert Mills Circle
Email: michaelkoon85@gmail.com
Phone: 816.456.7550

A. Have you attended or called into a Board meeting this year? If so, when?

I attended the May meeting

B. Professional and Educational Background (please summarize):

1. Your professional/work history:

Partner, Norton Rose Fulbright (2014-2019)
Partner, Shook Hardy & Bacon, (1989-2014)
Associate, Shook Hardy & Bacon (1985-1989)
Associate, Arter & Hadden, (1981-1985)

2. Your educational background:

University of Iowa, BA 1978, JD 1981

3. Any notable accomplishments/awards/recognition:

Legal 500, individual listing
Lawdragon Notable Lawyers, individual listing
Super Lawyer, individual listing

4. Your volunteer activities outside I'On and/or before moving to I'On:

Member, National Committee, Kemper Museum of Contemporary Art
Board, Historic Kansas City Foundation
Co-chair, Save the Plaza Committee
Member, Sullivan's Island Board of Zoning Appeals
Member, Champion Hills Wellness & Recreation Committee

5. Your relevant skills (for example, financial, legal, communications, computers/internet/website administration, etc.):

Legal, mediation, negotiation, communication

C. HOA Involvement:

1. Do you have prior experience on an HOA board?

I served on the HOA board for a downtown Charleston condo

2. Can you attend regular monthly Board Meetings?

Yes

3. Can you devote 5 to 10 hours per month to fulfill your Trustee responsibilities?

Yes

4. What Board Committees interest you? (*Amenities, Communications, Covenants, Finance, I'On Design committee (IDC), Infrastructure, Landscaping*)

Amenities, Communication, IDC, infrastructure

D. I'On Involvement:

1. How long have you lived in I'On?

Two years

2. Please list the I'On activities you participate in (examples might include: the I'On Club, Lunch Bunch, Yarn Buddies, Women's Coffee, book clubs, dinner clubs, Trust Events, First Friday Cocktail Parties, Potluck Dinners etc.):

First Friday, Trust events

3. Please describe your I'On volunteer activities (examples might include: the I'On Trust, the newsletter/Communications Committee, Ambassadors, the Tour of Homes, Board Committees, Conservation Corps, etc.):

I have been directly involved in community efforts to stop the conversion of CV-9 into an active cemetery and mausoleum

E. Issues, positions, goals, etc.:

1. What do you think are the top 3 issues facing the Assembly in the coming year, and how would you address them as a Board member?

- **Improving transparency and communication between the board and homeowners— Homeowners are invested in I'On and want to be informed about what is going on. But people are busy and often do not have the time to fully engage, even on important issues. The board needs to make its communications succinct, readily understandable, informative and timely. Meeting agendas should actually tell readers**

what will be taken up, and summaries should be promptly available after the meeting that tie directly to the agendas. More frequent emails responding to questions submitted by homeowners should be added.

- **Improving homeowner satisfaction**—A greater effort should be made to be sure that the board’s priorities are informed by residents’ needs and desires. There are online and other tools that can be used to solicit information from homeowners on priorities, as well as collecting novel ideas for making I’On even better.
- **Crafting and executing on a vision for I’On’s future**—an effective board should be looking at long-term issues and opportunities. It should not confine itself to just reacting, or hamstringing itself based on historical grudges. The conclusion of the Creek Club lawsuit and the recent coalescing of opposition to the development of CV-9 mark a watershed moment for I’On. Going forward, the community needs a board that is strategic in its thinking, businesslike in its approach and able to set a course that will enhance life in I’On for years to come.

2. Why do you want to be on the Board of Trustees? What are your goals and objectives as a Trustee?

I believe that I have the skills, temperament and time necessary to improve the delivery of services to I’On residents by the board. In addition to working on the priorities identified above, my goal would be to foster a more courteous and respectful relationship between the board and homeowners.

3. What else would you like the community to know about you?

In the short time that we have lived here, my wife and I have fallen in love with I’On. Now, we really cannot imagine living anywhere else in the Charleston area. I’d like to do my part to make sure that others—both those here now and those who may come later—enjoy I’On as the remarkable place that we discovered when we moved here.

Please note that Board Applications will be published to the community.



2024 I'On Assembly Board of Trustees Application

Name: Jody McAuley

Address: 94 Ponsbury Road

Email: jmcauley@rwbaird.com

Phone: 843-469-0700 (mobile)

A. Have you attended or called into a Board meeting this year? If so, when?

I have not attended meetings in person since leaving the HOA board in 2019. I've called in. I have previously served on the HOA Board two separate times. I'm a past Chair of the IDC and have been the President of the HOA for three years.

B. Professional and Educational Background (please summarize):

1. Your professional/work history:

- a. Director / Branch Manager / Private Wealth Management / Robert W. Baird (25+ years)

2. Your educational background:

- a. University of South Carolina – 1991
- b. The Asheville School – 1987

3. Any notable accomplishments/awards/recognition:

- a. I'On Civitas Award 2020
- b. The President's Volunteer GOLD Service Award - 2018
 - i. Presented by the Corporation for National and Community Service in recognition and appreciation for commitment to strengthen our nation and communities through Volunteer Service.
- c. Member of the 2019-2029 Town of Mount Pleasant Comprehensive Plan committee. We collectively helped draft the town's ten-year strategic plan which is in effect today.

4. Your volunteer activities outside I'On and/or before moving to I'On:

- a. Family time with my lovely wife Chloe of 30 years and my terrific daughters have been my focus over the past few years. We have lived in I'On for twenty years and always raise our hands to volunteer.
- b. I have been involved in many boards over the years including the Chamber of Commerce and Habitat for Humanity plus lots of work-related committees and volunteer projects.

5. Your relevant skills (for example, financial, legal, communications, computers/internet/website administration, etc.):
 - a. Most relevant skills for the HOA Board would have to be my institutional knowledge of I'On, our by-laws and covenants, the long history of the development, working directly with so many I'On residents who have literally built the community values present today. Too many names to list, but I know who to call and what to ask.

C. HOA Involvement:

1. Do you have prior experience on an HOA board?

Yes. Back in 2009 I was Chair of IDC during the early phases of development. We transitioned the IDC during that time from a developer run IDC over to the HOA.

2010 – I was the President of the HOA. I was also the President of the HOA in 2018 and again in 2019. While it clearly takes the entire board to pass initiatives for I'On – I played a vital role in the following projects:

1. Help pass the “Transfer Fee” – (door to door campaign needing 75% of residents to pass) This allowed both the HOA and the Trust to capitalize on a small portion of the sales price for homes in I'On.
2. ADU's (Accessory Dwelling Unit or Carriage House) for I'On – I was the lead HOA representative for I'On to the TOMP to allow and set guidelines for the establishment of ADU's in I'On. This allows homeowners the ability to have their parents live with them in their carriage house for example. (Children after college, nanny's, graduate students looking to rent, etc.)
3. Worked to add value to the I'On waterfront and docks – We started small by adding water to the docks and ultimately spent over a year with DHEC and OCRM to add another 100 feet of deep-water dock space. Leading real estate experts have said that our deep-water dock space contributes up to 5% of the value of our properties in I'On.
4. Worked with TOMP to implement and execute a plan to clear and clean out our marsh trails.
5. Negotiated the formal financial relationship between the HOA and the I'On Trust. Early on in I'On the Trust had to go “hat in hand” to raise money to put on our wonderful community events (After Bridge Party, July 4th celebration, Holiday in the Hood, etc.). It made sense to guarantee that a portion of our homeowner assessment would be made available annually, if needed, to support the great work by the Trust volunteers.
6. Worked on the contract (lots of people contributed) inking the deal between I'On and Olde Park for dock access and removing The I'On Club's membership from access rights.
7. One of my most cherished contributions in I'On was being asked twice to write and read the annual Civitas Award. I was grateful to be able to celebrate Michael Purcell a few years ago and Tom O'Brien last year.

2. Can you attend regular monthly Board Meetings? YES

3. Can you devote 5 to 10 hours per month to fulfill your Trustee responsibilities? YES

4. What Board Committees interests you? (*Amenities, Communications, Covenants, Finance, I'On Design committee (IDC), Infrastructure, Landscaping*) I'M OPEN TO FILLING IN WHERE IT MAKES THE MOST SENSE FOR OUR HOMEOWNERS.

D. I'On Involvement:

1. How long have you lived in I'On? 20 YEARS

2. Please list the I'On activities you participate in (examples might include: the I'On Club, Lunch Bunch, Yarn Buddies, Women's Coffee, book clubs, dinner clubs, Trust Events, First Friday Cocktail Parties, Potluck Dinners etc.): I'On Club member for 20 years. Over the years my family and I have done almost everything. I even had a garage band in the past that was asked to play at one of the After The Bridge Run party on the amphitheater.

3. Please describe your I'On volunteer activities (examples might include: the I'On Trust, the newsletter/Communications Committee, Ambassadors, the Tour of Homes, Board Committees, Conservation Corps, etc.): See above. My wife Chloe get's the credit for lots of these. Families make I'On work best!

E. Issues, positions, goals, etc.:

1. What do you think are the top issues facing the Assembly in the coming year, and how would you address them as a Board member? I like being involved in I'On and feel a sense of responsibility to this community. My family and I have taken far more from I'On then we have given back over the past few decades. My institutional experiences as a member of the HOA board in I'On make me a good candidate to look ahead 5-10-15 years for I'On. I have never been a controversial member of our community. I appreciate the successful development called I'On that I have raised my family in. I will move the narrative away from past grievances with the developer and focus on the things we can do in I'ON to make this the best community it can be. The lawsuit settlement is finally over, and we need to address how to replenish our financial obligations as well as look forward to how this money will be best and properly allocated. We need to formally put plans in place to protect and upgrade our amenities - like the beautiful three-mile walking trails. We need to be fiscally mindful of where our money is spent and how it is spent. We need to engage more of our collective community when we can and less time with the very small number of residents who have literally been against every initiative in I'On from the beginning of time. A vote for me is a vote to get projects done. That is my goal and always has been. I don't want to be involved unless we are doing tangible things to enhance the communities value. Anti developer meetings and conversations are not my area of expertise. I'On is built out and, in my opinion, it's time to move on and focus on what separates our community from the others. This should be fun work – not political. Finally, I don't think Phase 11 has an option for development other than a thoughtful compromise which would greatly enhance the value for all I'On titleholders. Without a groundswell of organic support (which I don't think is possible right now), Phase 11 is not an area I would have interest focusing on.

2. Why do you want to be on the Board of Trustees? What are your goals and objectives as a Trustee? See Above

3. What else would you like the community to know about you?

I'm 56. I have been married to my wife Chloe for thirty years. We have two great girls, Chloe 23 and Clark 21. Some of you may know my dog Mackie (13-year-old Springer Spaniel). My entire family are Gamecocks. We still go to all the football games. I like to be on the water, fish, flyfish and spend time at the beach. Our adult life has been in I'On. We have dozens of invaluable family friends in the I'On community, and we all have raised our children here. We are blessed beyond words that we moved to I'On that many years ago, met new friends, raised our kids, and built lifelong memories. **A vote for me is a vote for Positivity and Productivity.** I'll represent you and will always make myself available. Call or email me anytime before, during or, hopefully, after the election. Thanks, I'On Community, for the chance to serve again.

Please note that Board Applications will be published to the community.

I'On Assembly Board of Trustees Application

Name: **Tom O'Brien**

Address: **15 Hopetown Rd**

Email: tom.obrien@simpactful.com, obrien.thomasmurray@gmail.com

Phone: **513-324-0790 (cell)**

1. Have you attended a Board of Trustees meeting this year? If so, when?

The October meeting this year and I have previously served on the I'ON HOA board for eight years (President, VP & Chairman of the Covenants & past Chair of the Amenities Committee. I have also served a member of the Creek Club litigation Subcommittee (for the past six years) and currently serve as chair of the I'ON appeals committee

A. Professional and educational background:

1. Your professional/work history:

- **Founder & past Chairman Simpactful Consulting (www.simpactful.com) 1/1/15-Current**
- **Sr Advisor- The Boston Consulting Company (BCG) 2009-2020**
- **Board of Directors & Compensation Chair First Financial Bank ((FFBC) 2009-Current**
- **Advisory Board- Harry's (Harrys.com) 2017-current**
- **Advisory Board- Eversight Analytics- 2012-2022 (acquired in 2022 by Instacart)**
- **President/Chief Global Customer Officer- Procter & Gamble 7/78-7/2009**

2. Your educational background:

- **Loyola Marymount University, BS Marketing**

3. Any notable accomplishments/awards/recognition:

- **Father of three great daughters and Grandparent to 9 grandkids**
- **2023 I'ON Civitas awardee**
- **Cancer survivor :O)**

4. Your volunteer activities outside I'On and/or before moving to I'On

- **One 80 Place Board of Directors (Charleston)**
- **573 Meeting Street (affordable housing) Board of Directors (Charleston)**
- **Past HOA board president in Arizona & California**
- **St Vincent De Paul Executive Committee (Cincinnati) 15 years**

5. Your relevant skills: **Leadership, complexity mgt, strategic planning**

B. HOA Involvement

1. Prior experience on an HOA board?

- **I'ON HOA board President, VP/Covenants & prior Amenities Chair**
- **Prior HOA board president (California & Arizona)**

2. Can you attend regular board meetings: **Yes**
3. Can you devote 5 to 10 hours a month to fulfill your Trustee responsibilities? **Yes**
4. What Board Committees interests you: **Amenities, Landscaping & Infrastructure**

C. I'ON Involvement

1. How long have you lived in I'ON?

- **Thirteen years**

2. Please list the I'ON activities you participate in:

I'ON Trust events, First Fridays, Pot Lucks, I'ON @ Home events

3. Please describe your I'ON volunteer activities:

Past President & VP HOA board, Covenants committee Chair, and past Amenities Committee Chair & member of the Creek Club litigation subcommittee.

Served as the 2022 Chair of the I'ON giving lights committee where we achieved 80% neighborhood participation and raised \$57,000 for One80Place. Thanks to our incredible committee leads and street captains.

Currently serve as Chair of the I'ON appeals committee

D. Issues, positions, goals, etc.:

1. What do you think are the top 3 issues facing the Assembly in the coming year and how would you address them as a Trustee?

- ***The graceful aging of I'ON- Insuring proper processes are in place to maintain homes, yards and HOA properties in accordance with I'ON's CC&R's. For example, I believe the marsh trail has fallen into a state of disrepair (narrow path, exposed roots creating tripping hazards and limited marsh views) I also believe that we need to make progress faster on replacement of the amphitheater.***
-
- ***Financial stability- I believe that recent boards/ finance committees have done a great job of making certain that we have proper reserve funding to keep our neighbor amenities in great shape and prevent the need for surprise assessments. As most neighbors know, we finally won the Creek Club litigation and those funds can be used to replace the money taken from the reserves to purchase the docks and Creek Club back from the Civitas group as well as to contribute to the previously established strategic investment fund that would enable the neighborhood the choice to buy out the existing lease on the earliest possible timing.***
-
- ***Future development in I'ON-Aligned with the originally approved PD (planned development) unless further development would benefit the overall community. I would be opposed to an active cemetery in I'ON***

2. Why do you want to be on the Board of Trustees? What are your goals and objectives as a Trustee?

- ***I believe that I'ON is an incredible place to live and I very much appreciate how prior neighbor leaders have volunteered their time to make this happen. I hope to invest my time to continue what others have started.***
- ***Achieve greater levels community involvement and civility via the various committees/activities***
- ***Build the "I'on brand" internally & externally***

3. What else would you like the community to know about you?

- ***I'm always happy to communicate via calls, emails or over a cup of coffee***



2024 I'On Assembly Board of Trustees Application

Name: Simon O'Shea

Address: 79 Hopetown Road

Email: simondoshea@yahoo.com

Phone: 843-637-5867

A. Have you attended or called into a Board meeting this year? If so, when?

I am a serving board member so have attended or dialed into all Board Meetings bar one when I was on vacation in Europe, so couldn't dial-in due to the difference in time zones.

B. Professional and Educational Background (please summarize):

1. Your professional/work history:

I worked for almost 20 years in the City of London. I started my career working at KPMG in their actuarial practice, before moving into management consultancy. I then moved to Institutional Fixed Income Sales and Trading at Morgan Stanley and BNP Paribas. I am now Chief Investment Officer at Ballast Rock, a broker dealer, asset manager and registered investment advisor headquartered in Charleston.

2. Your educational background:

I studied Theoretical Physics at Trinity College Dublin and Actuarial and Financial Studies at University College Dublin. I qualified as an actuary when I worked at KPMG. I am Series 7 and Series 64 licensed.

3. Any notable accomplishments/awards/recognition:

I was awarded entrance scholarships to both Trinity and UCD, at KPMG I was the youngest manager in the group's history (pretty sure that record no longer stands – the managers seemed to get younger every year!) and I became a Fellow of the Institute of Actuaries in the UK in 2006. I have helped our team increase AUM at Ballast Rock tenfold over the last 2 years.

4. Your volunteer activities outside I'On and/or before moving to I'On:

I volunteered at a rugby charity providing sports classes to groups from local SEN schools called Sarries Inspire as well as a number of local food charities combatting food poverty in the local community. I was the chair for the Irish Recruitment Team at Morgan Stanley.

5. Your relevant skills (for example, financial, legal, communications, computers/internet/website administration, etc.):

I have spent most of my career working in financial services although my time as a consultant certainly gave me a more rounded experience. While not a lawyer I have a lot of experience in deal structuring and contract negotiation.

C. HOA Involvement:

1. Do you have prior experience on an HOA board?

Yes. I was elected to the Board in 2022 and have served as Amenities Chair since then.

2. Can you attend regular monthly Board Meetings?

Yes

3. Can you devote 5 to 10 hours per month to fulfill your Trustee responsibilities?

Yes

4. What Board Committees interests you? (*Amenities, Communications, Covenants, Finance, I'On Design committee (IDC), Infrastructure, Landscaping*)

I would like to continue on as Amenities Chair but would be very happy to serve wherever I can.

D. I'On Involvement:

1. How long have you lived in I'On?

We bought our house on Hopetown Road in 2016.

2. Please list the I'On activities you participate in (examples might include: the I'On Club, Lunch Bunch, Yarn Buddies, Women's Coffee, book clubs, dinner clubs, Trust Events, First Friday Cocktail Parties, Potluck Dinners etc.):

With a young family most of my activities are based around the kids, so the Halloween Party, Giving Lights, the Christmas Horse Carriage Rides, Fourth of July parades, New Year's party etc.

3. Please describe your I'On volunteer activities (examples might include: the I'On Trust, the newsletter/Communications Committee, Ambassadors, the Tour of Homes, Board Committees, Conservation Corps, etc.):

I am currently a Board member and chair the Amenities Committee. I have attended all but one Board Meeting, Community Open Forums and Executive Sessions as well as a significant amount of time in legal sessions with the Assembly's Counsel as we dealt with a number of complex legal matters of the last two years.

Also, while not strictly volunteer work, I spent a lot of time working with neighbors during the Phase 11 plans in 2021 to help coordinate a response to the proposed development, ensuring views that weren't incorporated into the original plans were listened to and ultimately led to those development plans being abandoned.

E. Issues, positions, goals, etc.:

1. What do you think are the top 3 issues facing the Assembly in the coming year, and how would you address them as a Board member?

- 1) **Financial Strength**: I'On is 25 and aging gracefully, however I believe it is essential that the community remains on as financially stable a footing as possible, so we can continue to protect and promote the best of I'On in the years ahead. The Board has done a lot of good work to this end over the last few years, but we must remain focused and vigilant.
- 2) **Making our Voices Heard**: As the neighborhood matures there are still some issues that remain unresolved, particularly in relation to the original developer and the Creek Club. I think it's important that the community recognizes and understands its power when we cooperate and work together on these issues. The current Board does not support an active cemetery in I'On and I am also personally opposed to an active cemetery in the neighborhood. I believe the board should look at taking a more proactive stance in dealing with some of these legacy issues.
- 3) **Improving Amenities For Everybody**; Some communal areas are starting to show wear and tear commensurate with their age e.g. structures in some of the playgrounds have had to be demolished for safety reasons, the Structure at the amphitheater was knocked down etc. I believe that by working together as a community we can set I'On on the right path for the next 25 years.

2. Why do you want to be on the Board of Trustees? What are your goals and objectives as a Trustee?

I think it's important that Board members make decisions based on what's in the best interest of the entire community. This is something that guides every decision I have ever made on the board and I would like to continue to try to do what is best for all our neighbors.

I also think different perspectives on the Board need to be represented. As a father of three young children, I believe I help provide some perspective on how young families engage with and enjoy the neighborhood. That is why I recommended to the Board that we form a Playground Subcommittee to look at how we can improve the neighborhood's playground facilities. The subcommittee is working on some really exciting changes and I would like to be able to see them through to completion.

Finally I want to be on the Board of Trustees to help promote neighborly communication and cooperation. To achieve goals that are going to enhance the neighborhood for everybody, we are better served by working together as a community.

3. What else would you like the community to know about you?

My guiding principle has been and will always be; what is best for l'On as a community. If I am elected to the Board, that will continue to be my priority.

Please note that Board Applications will be published to the community.

2024 I'On Assembly Board of Trustees Application

Name: Roy Rathbun
Address: 30 Mises Street
Email: RWR1010@Gmail.com
Phone: 973.303.1012

A. Have you attended or called into a Board Meeting this year? If so, when?

I attended the June, October and November Board meetings.

B. Professional and Educational Background

- 1. Your professional/work history:** After graduating from college in 1974, I began my business career selling manufacturing supplies. Upon graduating from business school in 1977, I worked at GATX, a leading leasing company, for two years, and then went to US Lines, a container shipping company. After four years with US Lines, I worked for one year at American Trading and Production, a privately held conglomerate in Baltimore. I then went to work for Cunard Cruise Lines for 13 years, holding senior positions in general management, finance and marketing. When Cunard relocated from New York to Miami, I made the decision not to stay with the firm for professional and personal reasons. I then worked for 16 years at Holsted Marketing, a leading direct marketing firm located in New York. In 2016 we moved to Mount Pleasant, where I began my career as a fractional chief financial officer.
- 2. Your educational background:** I graduated in 1974 from Montclair University with a BA in Political Science and a minor in History. In 1977 I obtained a Masters in Business Administration from Columbia University with a concentration in Finance.
- 3. Any notable accomplishments/awards/recognition:** My recognition in the corporate world was achieved by rapid increases in responsibility throughout my career. The one significant professional accomplishment I would point to is Cunard's acquisition of the Royal Viking Sun, at the time the highest-rated cruise ship. I lead the team which developed the financial analysis for the purchase, and was then put in charge of the team integrating the asset into Cunard's marketing and operations.
- 4. Your volunteer activities outside I 'On and/or before moving to I 'On:** While living in New Jersey I was active with the Red Cross for a period. Since moving to I 'On in 2016, I have been a mentor in SCORE (Service Community of Retired Executives, a US Department of Commerce program) advising entrepreneurs and small business owners. I also serve on

the Finance Committees of Trident United Way as well as One80Place, the Charleston-based non-profit focused on solving homelessness.

- 5. Your relevant skills (for example, financial, legal, communications, computers/internet/website administration, etc.):** my four decades in corporate America have provided me with the opportunity to be a Chief Financial Officer with responsibilities including corporate strategy, treasury management, budgeting, auditing, and financial statement preparation and analysis.

C. HOA Involvement:

- 1. Do you have prior experience on an HOA board?**

I have not previously served on an HOA board.

- 2. Can you attend regular monthly Board Meetings?**

I can attend regular monthly Board Meetings.

- 3. Can you devote 5-10 hours per month to fulfill your Trustee responsibilities?**

I can devote 5-10 hours per month to fulfill my Trustee responsibilities.

- 4. What Board Committee interests you? (*Amenities, Communications, Covenants, Finance, I 'On Design Committee (IDC), Infrastructure, Landscaping*)**

I plan to continue on the Finance Committee if elected.

D. I'On Involvement

- 1. How long have you lived in I 'On?**

I have lived in I'On for seven years and four months.

- 2. Please list the I'On activities you participate in (examples might include: the I 'On Trust, Lunch Bunch, Yarn Buddies, Women's Coffee, book clubs, dinner clubs, Trust Events, First Friday Cocktail Parties, Potluck Dinners, etc.):**

I have regularly enjoyed Potluck Dinners and First Fridays while residing in I 'On. In addition, I have been a member of two book clubs during my time here. Currently, I am a participant in a men's discussion group, which meets monthly to discuss local, state, national and international issues and developments. My wife and I have been members of I 'On at Home for four years. In addition, we frequently participate in Trust events.

- 3. Please describe your I'On volunteer activities (examples might include: the I'On Trust, the newsletter/Communications Committee, Ambassadors, the Tour of Homes, Board Committees, Conservation Corps, etc.):**

I have been a member of three committees during my I'On residency: the Compliance Committee (2019-2021), the Finance Committee (since July 2023) and the IDC Appeals Committee (April 2023 – present).

E. Issues, positions, goals, etc.:

1. What do you think are the top 3 issues facing the Assembly in the coming year, and how would you address them as a Board member?

I believe the top 3 issues facing the Assembly in the coming year are (1) maintaining our sense of community; (2) ensuring the long-term financial health of I 'On; (3) continuing to invest in our infrastructure, both physical and social. As to how I would address them as a Board member, I would stress collegiality and cooperation to my fellow Board members and residents. We need to work together to address critical issues to ensure the outcome is beneficial to I 'On. Our long-term financial health will be secured by increasing our reserves, making difficult decisions about our annual dues, and investing our funds in low-risk financial instruments appropriate for our HOA.

Why do you want to be on the Board of Trustees? What are your goals and objectives as a Trustee?

I want to be on the Board of Trustees because I believe we live in an appealing, well-governed and vibrant community, and I can be a productive contributor to maintaining our success. Having lived here for more than seven years, and been on three committees as noted above, I believe I have gained sufficient understanding of the challenges facing I 'On and possess the awareness, knowledge and experience to make a significant contribution while a member of the Board of Trustees. My goals and objectives were addressed in my response to the previous question.

2. What else would you like the community to know about you?

I would like the community to know that I am approachable, fair-minded, reflective, considerate, and believe in collaborative decision-making. I believe it is critical to listen to alternative viewpoints and give proper consideration to those whose positions on issues may differ from my own. If elected, I commit to demonstrating those qualities to the community. I believe my experience in general management and finance equips me to navigate the complexities of the issues we face in I'On.

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