

1990-91

**STATEMENT OF
ECONOMIC INTERESTS**

MANUAL AND FORM 721

THIS MANUAL CONTAINS:

**INSTRUCTIONS
EXAMPLES
FORM 721**

**IF YOU ARE AN OFFICIAL WHOSE POSITION
IS LISTED IN GOVERNMENT CODE SECTION 87200,
USE FORM 721 TO FILE:**

**ASSUMING OFFICE STATEMENT
ANNUAL STATEMENT
LEAVING OFFICE STATEMENT
CANDIDATE STATEMENT**

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1991 LEGISLATIVE CHANGES

Effective January 1, 1991, new prohibitions and limitations will be imposed on gifts and honoraria received by elected state and local officials, state agency officials, members of state boards and commissions, and certain employees of state agencies.

WARNING: These new prohibitions and limitations do not affect the requirements for disclosing gifts and honoraria received.

NEW GIFT LIMIT:

Elected State Officers may not accept gifts with a value of more than \$250 in a calendar year from a single source.

Local Elected Officers may not accept gifts with a value of more than \$1,000 in a calendar year from a single source.

Members of State Boards and Commissions, State Agency Officials, and Designated State Employees may not accept gifts with a value of more than \$250 in a calendar year from any single source, if the member or employee would be required to report the receipt of income or gifts from that source on his or her statement of economic interests.

This prohibition does not apply to a part-time member of the governing board of a public institution of higher education, unless the member is also an elected official.

EXCEPTIONS TO NEW GIFT LIMIT:

The following are not prohibited or limited under the new gift provisions:

- The items listed on page 23 "Exceptions From Disclosure."
- Payments, advances, or reimbursements for travel and related lodging and subsistence as described on the next page.
- Wedding gifts.

NOTE: Certain payments for travel and all wedding gifts received by elected state officers and certain state board and commission members and state agency officials and employees are subject to the lobbyist gift prohibition described below.

GIFTS FROM LOBBYISTS:

Elected State Officers and Certain State Board and Commission Members and State Agency Officials and Employees are prohibited from accepting a gift or gifts aggregating more than \$10 in a month from a lobbyist or lobbying firm registered with the Secretary of State.

NEW HONORARIA PROHIBITION:

Elected State Officers may not accept any honorarium. "Honorarium" means, with the exceptions noted below, any payment made in consideration for any speech given, article published, or attendance at any public or private conference, convention, meeting, social event, meal or like gathering.

Local Elected Officers may not accept an honorarium for any speech given, article published, or attendance at any public or private conference, convention, meeting, social event, meal or like gathering, or any gifts from any single source, which is in excess of \$1,000 in a calendar year.

Members of State Boards and Commissions, State Agency Officials, and Designated State Employees may not accept an honorarium from any source if the member or employee would be required to report the receipt of income or gifts from that source on his or her statement of economic interests.

This prohibition does not apply to any part-time member of the governing board of any public institution of higher education unless the member is also an elected official.

EXCEPTIONS TO NEW HONORARIA PROHIBITION:

- 1) "Honorarium" does not include earned income for personal services which are customarily provided in connection with the practice of a bona fide business, trade, or profession, such as teaching, practicing law, medicine, insurance, real estate, banking, or building contracting, unless the sole or predominant activity of the business, trade, or profession is making speeches.
- 2) The new honoraria prohibition does not apply to payments, advances and reimbursements for travel and related lodging and subsistence, as described below.
- 3) The new honoraria prohibition does not apply to any honorarium which is not used and, within 30 days after receipt, is either returned to the donor or delivered to the Controller for donation to General Fund, without being claimed as a deduction from income for tax purposes.

PAYMENTS FOR TRAVEL:

With the following exceptions, gifts of travel are subject to the new limits described above:

Exceptions: A payment, advance, or reimbursement for travel, including actual transportation and related lodging and subsistence, which is reasonably related to a legislative or governmental purpose, or to an issue of state, national, or international public policy, is not prohibited or limited, if any of the following apply:

- (1) The travel is in connection with a speech given by an elected officer, member of a state board or commission, or designated employee of a state agency, the lodging and subsistence expenses are limited to the day immediately preceding the day of, and the day immediately following the speech, and the travel is within the United States.
- (2) The travel is provided by a government, a governmental agency, a foreign government, a governmental authority, a bona fide public or private educational institution, as defined in Section 203 of the Revenue and Taxation Code, or nonprofit charitable or religious organization which has exempt status under Section 501(c) (3) of the Internal Revenue Code.
- (3) The travel costs are paid from campaign funds.
- (4) The travel is provided by the agency of the elected officer, member of a state board or commission, or designated employee.
- (5) The travel is reasonably necessary in connection with a bona fide business, trade, or profession and satisfies the criteria for federal income tax deduction for business expenses in Sections 162 and 174 of the Internal Revenue Code, unless the sole or predominant activity of the business, trade, or profession is making speeches.
- (6) The travel is excluded from the definition of a gift by any other provision of the Political Reform Act.

IMPORTANT

Public officials are, under certain circumstances, required to disqualify themselves from making, participating in, or attempting to influence governmental decisions which will affect any of their financial interests, not just those which they are required to disclose on a statement of economic interests. The Fair Political Practices Commission's Guide to the Political Reform Act: California's Conflict of Interest Law for Public Officials explains what a conflict of interest is, and when disqualification is required by law.

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STATE OFFICERS AND OFFICIALS AND EMPLOYEES OF STATE AND MULTI-COUNTY AGENCIES WHO MANAGE PUBLIC INVESTMENTS

Who Are State Officers?

Governor
Lieutenant Governor
Attorney General
Controller
Insurance Commissioner
Secretary of State
Treasurer
Superintendent of Public Instruction

State Board of Equalization Members
Public Utilities Commissioners
State Energy Resources Conservation and Development
Commissioners
State Coastal Commissioners
Fair Political Practices Commissioners
Members of the State Legislature

Types of Statements And When Statements Must Be Filed

**FAILURE TO FILE STATEMENTS ON TIME MAY RESULT IN PENALTIES INCLUDING
BUT NOT LIMITED TO LATE FINES.**

Assuming Office Statement:

Newly-Elected Officeholder:

File no later than **30 days** after you assume office. (If you are a newly-elected state officer who was a non-incumbent candidate, and who assumed office in December or January, do not file an assuming office statement. Instead, you must file an annual statement covering the period from the day after you filed your candidate's statement through December 31.)

Newly-Appointed Officeholder:

File no later than **10 days** after you assume office, unless subject to confirmation by the State Senate, in which case you must file no later than 10 days after appointment or nomination.

Annual Statement:

State Officers:

File any time after December 31, 1990, and no later than March 1, 1991.

Officials and Employees of
State and Multi-County
Agencies Who Manage Public
Investments:

File any time after December 31, 1990, and no later than April 1, 1991.

Leaving Office Statement:

File no later than **30 days** after you leave office.

Candidate Statement:

File no later than the final filing deadline for your declaration of candidacy.

What Period Does The Statement Cover?

Assuming Office Statement:

Newly-Elected Officeholder:

On an assuming office statement, you must disclose on Schedules A, B, C-1, and C-2 any investments or interests in real property you held on the date you assumed office. In addition, on Schedules D, E, F, G and H-1 through H-3, you must report income received during the 12 months prior to the date you assumed office.

Newly-Appointed Officeholder
Not Subject To Senate
Confirmation:

On an assuming office statement, you must disclose on Schedules A, B, C-1, and C-2 any investments or interests in real property you held on the date you assumed office. In addition, on Schedules D, E, F, G and H-1 through H-3, you must report income received during the 12 months prior to the date you assumed office.

Newly-Appointed Officeholder
Subject To Senate
Confirmation:

On an assuming office statement, you must disclose on Schedules A, B, C-1 and C-2 any investments or interests in real property you held on the date of your appointment or nomination. In addition, on Schedules D, E, F, G and H-1 through H-3, you must report income received during the 12 months prior to the date of your appointment or nomination.

Annual Statement:

On an annual statement you must report the investments and interests in real property held and income received during the reporting period.

The reporting period begins on:

January 1 (the day after the closing date of your previous annual statement), or

The day after the date you assumed office, whichever is later.

The reporting period ends on:

December 31.

SPECIAL EXCEPTION FOR NEWLY-ELECTED NON-INCUMBENT STATE OFFICEHOLDERS:

A newly-elected non-incumbent state officeholder who assumed office in December or January:
On an annual statement, you must report the investments and interests in real property held and income received during the reporting period.

The reporting period begins on:

The day after you filed your candidate statement.

The reporting period ends on:

December 31.

SPECIAL EXCEPTION TO ANNUAL STATEMENTS: (DOES NOT APPLY TO ELECTED STATE OFFICERS)

If you assumed office between October 1, 1990 and December 31, 1990, and filed an assuming office statement, you are not required to file an annual statement until March 1, 1992. If you choose to do this, the first annual statement you file will cover a period longer than a calendar year and the period will begin on the day after your assuming office date. (This exception is not available to a filer who is re-appointed or re-elected to the same or similar position. Such filers are not required to file an assuming office statement, but are required to file the next annual statement due.)

Example: If you assumed office on December 15, 1990, and your annual filing deadline is March 1, you will not file an annual statement for the March 1, 1991 deadline, but will wait until the March 1992 deadline. The period covered by your annual statement filed in 1992 will be December 16, 1990 through December 31, 1991.

Leaving Office Statement:

On a leaving office statement, you must report the investments and interests in real property you held and income received during the reporting period.

The reporting period begins on:

January 1 (the day after the closing date of a previous annual statement), or

The day after the date you assumed office, whichever is later.

The reporting period ends on:

The day you left office.

SPECIAL EXCEPTIONS TO LEAVING OFFICE STATEMENTS:

- If you leave an office and assume another office within the same jurisdiction on the same day, you are not required to file leaving office and assuming office statements. Instead, you should file the next annual statement.
- If you leave office between January 1 and the filing deadline of your annual statement, you may combine your leaving office statement and your annual statement. Prior to the annual filing deadline, you must notify your filing officer in writing that you intend to follow this procedure. (Regulation 18723(d).)

To file a combined leaving office statement and annual statement, check the boxes on the cover page for both kinds of statements, fill in the space for the date you left office, and report the interests you held during the period.

The reporting period begins on:

January 1 (the day after the closing date of your previous annual statement), or

If you assumed office during 1990 the period will begin with the day after you assumed office.

The reporting period ends on:

The day you left office.

Example: If you left office on January 7, 1991, and your annual filing deadline is March 1, 1991, you may combine your annual statement and your leaving office statement. This statement will cover January 1, 1990 (the day after the closing date of your previous annual statement), through January 7, 1991, your leaving office date. Your statement would be due no later than February 6, 1991 (30 days after leaving office).

Candidate Statement:

On a candidate statement, you must report the investments and interests in real property you hold on the date you file your candidate statement, which must be no later than the final filing date of your declaration of candidacy.

SPECIAL EXCEPTION TO CANDIDATE STATEMENTS:

- If you have filed, within 60 days before filing your declaration of candidacy, an assuming or annual statement for the same jurisdiction, you are not required to file a candidate statement.

Where Must Statements Be Filed?

- Governor - The Governor's Office
- Lieutenant Governor - The Lieutenant Governor's Office
- Attorney General - The Attorney General's Office
- Controller - The Controller's Office
- Insurance Commissioner - Department of Insurance
- Secretary of State - The Secretary of State's Office
- Treasurer - The Treasurer's Office
- Superintendent of Public Instruction - The State Board of Education
- State Assembly Members - The Clerk of the Assembly
- State Senate Members - The Secretary of the Senate
- State Board of Equalization Members - The State Board of Equalization
- Public Utilities Commissioners - The Public Utilities Commission
- State Energy Resources Conservation and Development Commissioners - The State Energy Resources Conservation and Development Commission
- State Coastal Commissioners - The State Coastal Commission
- Fair Political Practices Commissioners - The Fair Political Practices Commission
- Officials and Employees Who Manage Public Investments - The Filing Official of Your Agency
- Candidate Statements - File with the Registrar of Voters/County Clerk of the county in which you file your declaration of candidacy.

Original Statements of Economic Interests Form 721 filed by most state officers are forwarded to the filing officer, the Fair Political Practices Commission, by the agency which receives the statement.

Copies of statements filed by candidates for constitutional offices will be sent by the Fair Political Practices Commission to the Registrar of Los Angeles County and to the Clerk of the City and County of San Francisco.

Copies of statements filed by members of the Legislature will be sent by the Fair Political Practices Commission to the counties containing the largest number of registered voters in the legislators' election districts.

JUDICIAL OFFICERS

Who Are Judicial Officers?

Judges (Supreme, Appellate, Superior, Municipal and Justice)
Court Commissioners

Types Of Statements And When Statements Must Be Filed

**FAILURE TO FILE STATEMENTS ON TIME MAY RESULT IN PENALTIES INCLUDING
BUT NOT LIMITED TO LATE FINES.**

Assuming Office Statement:

Newly-Elected Officeholder: File no later than **30 days** after you assume office.

Newly-Appointed Officeholder: File no later than **10 days** after you assume office, unless subject to confirmation by the Commission on Judicial Appointments, in which case you must file no later than 10 days after appointment or nomination.

Annual Statement:

File any time after December 31, 1990, and no later than March 1, 1991.

Leaving Office Statement:

File no later than **30 days** after you leave office.

Candidate Statement:

File no later than the final filing date for your declaration of candidacy. (Supreme Court Justices and Appellate Court Justices are not required to file candidate statements.)

What Period Does The Statement Cover?

Assuming Office Statement:

Newly-Elected Officeholder: On an assuming office statement, you must disclose on Schedules A, B, C-1, and C-2 any investments or interests in real property you held on the date you assumed office. In addition, on Schedules D, E, F, G and H-1 through H-3, you must report income received during the 12 months prior to the date you assumed office.

Newly-Appointed Officeholder
Not Subject To Confirmation
By The Commission On
Judicial Appointments:

On an assuming office statement, you must disclose on Schedules A, B, C-1 and C-2 any investments or interests in real property you held on the date you assumed office. In addition, on Schedules D, E, F, G and H-1 through H-3, you must report income received during the 12 months prior to the date you assumed office.

Newly-Appointed Officeholder
Subject To Confirmation
By The Commission On
Judicial Appointments:

On an assuming office statement, you must disclose on Schedules A, B, C-1 and C-2 any investments or interests in real property you held on the date of your appointment or nomination. In addition, on Schedules D, E, F, G and H-1 through H-3, you must report income received during the 12 months prior to the date of your appointment or nomination.

Annual Statement:

On an annual statement, you must report the investments and interests in real property held and income received during the reporting period.

The reporting period begins on:

January 1 (the day after the closing date of a previous annual statement), or

The day after the date you assumed office, whichever is later.

The reporting period ends on:

December 31.

SPECIAL EXCEPTIONS TO ANNUAL STATEMENTS:

- If you assumed office between October 1, 1990 and December 31, 1990, and filed an assuming office statement, you are not required to file an annual statement until March 1, 1992. The first annual statement you file will cover a period longer than a calendar year and the period will begin on the day after your assuming office date. (This exception is not available to a filer who is re-appointed or re-elected to the same or a similar position. Such filers are not required to file an assuming office statement, but are required to file the next annual statement due.)

Example: If you assumed office on December 15, 1990, and your annual filing deadline is March 1, you will not file an annual statement for the March 1, 1991 deadline, but will wait until the March 1992 deadline. The period covered by your annual statement filed in 1992 will be December 16, 1990 through December 31, 1991.

- If you assumed office after January 1, 1990, draw a line through "January 1" on the cover page of the Form 721 and write in the date you assumed office; or
- If you filed an assuming office statement before January 1, 1990, and have not filed a statement since, draw a line through "January 1" and write in the day after the date you assumed office.

Leaving Office Statement:

On a leaving office statement, you must report the investments and interests in real property you held and income received during the reporting period.

The reporting period begins on:

January 1 (the day after the closing date of a previous annual statement), or

The day after the date you assumed office, whichever is later.

The reporting period ends on:

The day you left office.

SPECIAL EXCEPTIONS TO LEAVING OFFICE STATEMENTS:

- If you leave office between January 1 and the filing deadline of your annual statement, you may combine your leaving office statement and your annual statement.

To file a combined leaving office statement and annual statement, check the boxes on the cover page for both kinds of statements, fill in the space for the date you left office, and report the interests you held during the period.

The reporting period begins on:

January 1 (the day after the closing date of your previous annual statement), or

If you assumed office during 1990, the period will begin with the day after you assumed office.

The reporting period ends on:

The day you left office.

Example: If you left office on January 5, 1991, and your annual filing deadline is March 1, 1991, you may combine your annual statement and your leaving office statement. This statement will cover January 1, 1990 (the day after the closing date of your previous annual statement), through January 5, 1991, your leaving office date. Your statement would be due no later than February 4, 1991 (30 days after leaving office).

- If you leave an office and assume another office within the same jurisdiction on the same day, you are not required to file leaving office and assuming office statements. Instead, you should file the next annual statement.

Example: If you are appointed to the Superior Court from the Municipal Court, you are not required to file a leaving office statement as a Municipal Court judge or an assuming office statement as a Superior Court judge. You file the next annual statement and indicate on the annual statement the name of the new court.

Candidate Statement:

On a candidate statement, you must report the investments and interests in real property you hold on the date you file your candidate statement, which must be no later than the final filing date for your declaration of candidacy.

SPECIAL EXCEPTION TO CANDIDATE STATEMENTS:

If you have filed, within 60 days before filing your declaration of candidacy, an assuming or annual statement for the same jurisdiction, you are not required to file a candidate statement.

Where Must Statements Be Filed?

Incumbents: File the original statement with the clerk of your court. (The statement must contain an original verification.)

Non-Incumbents: File the original statement with the county clerk.

All statements of economic interests filed by judges, judicial candidates and court commissioners are forwarded to the filing officer, the Fair Political Practices Commission, by the clerk of the court or the county clerk.

COUNTY AND CITY OFFICERS

Who Are County And City Officers?

County Officers

Members of the Board of Supervisors
Chief Administrative Officers
District Attorneys
Planning Commissioners
County Counsels
County Treasurers
Other County Public Officials And Employees
Who Manage Public Investments

City Officers

Mayors
Members of the City Council
City Managers
Chief Administrative Officers
Planning Commissioners
City Attorneys
City Treasurers
Other City Public Officials And Employees
Who Manage Public Investments

Types Of Statements And When Statements Must Be Filed

**FAILURE TO FILE STATEMENTS ON TIME MAY RESULT IN PENALTIES INCLUDING
BUT NOT LIMITED TO LATE FINES.**

Assuming Office Statement:

Newly-Elected Officeholder: File no later than **30 days** after you assume office.

Newly-Appointed Officeholder: File no later than **10 days** after you assume office, unless subject to confirmation by the State Senate, in which case you must file no later than 10 days after appointment or nomination.

Annual Statement:

File any time after December 31, 1990, and no later than April 1, 1991.

Leaving Office Statement:

File no later than **30 days** after you leave office.

Candidate Statement:

File no later than the final filing date for your declaration of candidacy.

What Period Does The Statement Cover?

Assuming Office Statement:

Newly-Elected Officeholder:

On an assuming office statement, you must disclose on Schedules A, B, C-1, and C-2 any investments or interests in real property you held on the date you assumed office. In addition, on Schedules D, E, F, G and H-1 through H-3, you must report income received during the 12 months prior to the date you assumed office.

Newly-Appointed Officeholder
Not Subject To Senate
Confirmation:

On an assuming office statement, you must disclose on Schedules A, B, C-1, and C-2 any investments or interests in real property you held on the date you assumed office. In addition, on Schedules D, E, F, G and H-1 through H-3, you must report income received during the 12 months prior to the date you assumed office.

Newly-Appointed Officeholder
Subject To Senate
Confirmation:

On an assuming office statement, you must disclose on Schedules A, B, C-1 and C-2 any investments or interests in real property you held on the date of your appointment or nomination. In addition, on Schedules D, E, F, G and H-1 through H-3, you must report income received during the 12 months prior to the date of your appointment or nomination.

Annual Statement:

On an annual statement, you must report the investments and interests in real property held and income received during the reporting period.

The reporting period begins on:

January 1 (the day after the closing date of a previous annual statement), or

The day after you assumed office, whichever is later.

The reporting period ends on:

December 31.

SPECIAL EXCEPTIONS TO ANNUAL STATEMENTS:

- If you assumed office between October 1, 1990 and December 31, 1990, and filed an assuming office statement, you are not required to file an annual statement until April 1, 1992. The first annual statement you file will cover a period longer than a calendar year and the period will begin on the day after your assuming office date. (This exception is not available to a filer who is re-appointed or re-elected to the same or a similar position. Such filers are not required to file an assuming office statement, but are required to file the next annual statement due.)

Example: If you assumed office on December 15, 1990, and your annual filing deadline is April 1, you will not file an annual statement for the April 1, 1991 deadline, but will wait until the April 1, 1992 deadline. The period covered by your annual statement filed in 1992 will be December 16, 1990 through December 31, 1991.

- If you assumed office after January 1, 1990, draw a line through "January 1" on the cover page of the Form 721 and write in the date you assumed office; or
- If you filed an assuming office statement before January 1, 1990, and have not filed a statement since, draw a line through "January 1" and write in the day after the date you assumed office.

Leaving Office Statement:

On a leaving office statement, you must report the investments and interests in real property you held and income received during the reporting period.

The reporting period begins on:

January 1 (the day after the closing date of a previous annual statement), or

The day after you assumed office, whichever is later.

The reporting period ends on:

The day you left office.

SPECIAL EXCEPTIONS TO LEAVING OFFICE STATEMENTS:

- If you leave office between January 1 and the filing deadline of your annual statement, you may combine your leaving office statement and your annual statement.

To file a combined leaving office statement and annual statement, check the boxes on the cover page for both kinds of statements, fill in the space for the date you left office, and report the interests you held during the period.

The reporting period begins on:

January 1 (the day after the closing date of your previous annual statement), or

If you assumed office during 1990, the period will begin with the day after you assumed office.

The reporting period ends on:

The day you left office.

Example: If you left office on January 5, 1991, and your annual filing deadline is April 1, 1991, you may combine your annual statement and your leaving office statement. This statement will cover January 1, 1990 (the day after the closing date of your previous annual statement), through January 5, 1991, your leaving office date. Your statement would be due no later than February 4, 1991 (30 days after leaving office).

- If you leave an office and assume another office within the same jurisdiction on the same day, you are not required to file leaving office and assuming office statements. Instead, you should file the next annual statement.

Candidate Statement:

On a candidate statement, you must report the investments and interests in real property you hold on the date you file your candidate statement, which must be no later than the final filing date for your declaration of candidacy.

SPECIAL EXCEPTION TO CANDIDATE STATEMENTS:

If you have filed, within 60 days before filing your declaration of candidacy, an assuming or annual statement for the same jurisdiction, you are not required to file a candidate statement.

Where Must Statements Be Filed?

County Elected Officer - *with your county clerk*

County Planning Commissioner - *with your county clerk or your agency (varies with each county)*

County Officials And Employees Who Manage Public Investments - *with your agency's filing official*

City Elected Officer - *with your city clerk*

City Planning Commissioner - *with your city clerk or your agency (varies with each city)*

City Officials And Employees Who Manage Public Investments - *with your agency's filing official*

Original Statements of Economic Interests (Form 721) filed by most county and city officials are forwarded to the filing officer, the Fair Political Practices Commission, by the agency which receives the statement.

DEFINITIONS OF TERMS FREQUENTLY USED

"Commission Income" -- means gross payments received as a result of services rendered as a broker, agent or a salesperson. See page 27 for additional information.

"Immediate Family" -- means your spouse and your dependent children.

"Jurisdiction" -- means:

- The State of California if you are a judge, court commissioner or a state officeholder or employee, a person who has left one of those offices, or a candidate for one of those offices.
- The geographic area in which the agency has jurisdiction if you are an official or employee of a multi-county agency.
- The county if you are a county officeholder or employee, a person who has left a county office, or a candidate for a county office.
- The city if you are a city officeholder or employee, a person who has left a city office, or a candidate for a city office.

Jurisdiction for reporting investments and sources of income:

A business entity or source of income is located in, or doing business in, the jurisdiction if it or a parent, subsidiary, or a related business entity:

- Manufactures, distributes or sells products or services on a regular basis in the jurisdiction.
- Plans to do business in the jurisdiction.
- Has done business in the jurisdiction within the previous two years.
- Has an interest in real property in the jurisdiction.
- Has an office in the jurisdiction.

Jurisdiction for reporting interests in real property:

Judges, court commissioners, state officeholders and state agency officials and employees have statewide jurisdiction and must report real property located anywhere within the State of California. An interest in real property is in the jurisdiction of a city or county if it is located in, or within two miles of, the city or county, or within two miles of any land owned or used by the city or county.

"Pro rata share" -- to determine your "pro rata share" of an interest in real property or investment, multiply the value of the interest or investment by the percentage owned by you and your immediate family.

"Reporting Period" -- means the period covered by the statement.

INTERESTS WHICH MUST BE DISCLOSED

In general, the kinds of interests which may have to be disclosed are:

- Investments (partnerships, common stock, etc.)
 - Worth \$1,000 or more in business entities located in or doing business in your jurisdiction
- Interests In Real Property
 - Worth \$1,000 or more located in your jurisdiction
- Interests In Real Property And Investments Held By Business Entities Or Trusts
- Income (Other Than Loans, Gifts And Honoraria)
 - Aggregating \$250 or more received from a source located in or doing business in your jurisdiction
- Loans (Received Or Outstanding During The Reporting Period)
 - Aggregating \$250 or more from a source located in or doing business in your jurisdiction
- Gifts
 - Aggregating \$50 or more received from any source located inside or outside your jurisdiction
- Honoraria
 - Aggregating \$50 or more received from any source located inside or outside your jurisdiction
- Commission Income (See page 27.)
- Income And Loans To Business Entities Or Trusts
- Income From Rental Property

Detailed explanations are provided on pages 14 through 29.

HOW TO COMPLETE A STATEMENT OF ECONOMIC INTERESTS

COVER SHEET AND SUMMARY PAGE

The cover sheet on your statement must be completed. The cover sheet requires you to state your name, address, the type of statement being filed and the period covered by the statement.

You must also complete the summary page on the reverse side of the cover sheet, but it should not be filled in until you have read the instructions for each of the schedules and completed, or determined that you are not required to complete, each of the schedules.

The summary page requires that you indicate whether each of the nine schedules is:

- Completed and attached, or
- Not completed because you had no interests to report.

EXAMPLE, SUMMARY PAGE

Complete the summary page of your statement only after reading the instructions on pages 14 through 29.

Assuming the following facts, if you were filing an annual statement, the summary page would be completed as indicated:

Schedule A--Investments (Which Are Not Held Through A Business Entity Or Trust). You own 50% of a land development company, located in your jurisdiction, worth \$1,000 or more. You reported it on Schedule A. On the summary page, under Schedule A--Investments, check the box for "Schedule Completed And Attached."

Schedule B--Interests In Real Property (Which Are Not Held Through A Business Entity Or Trust). The only real property that you own is your residence, which is exempt from disclosure; thus, you did not complete Schedule B. On the summary page, under Schedule B--Interests In Real Property, check the box for "No Reportable Interests."

Schedules C-1 and C-2 --Interests In Real Property And Investments Held By Business Entities Or Trusts. Because you have a 50% ownership interest in your land development company, you were required to complete Schedules C-1 and C-2 by reporting interests in real property and investments held by your land development company, in which your pro rata share was \$1,000 or more. On the summary page, under Schedules C-1 and C-2--Interests In Real Property And Investments Held By Business Entities Or Trusts, check the boxes for "Schedule Completed And Attached."

Schedule D--Income (Other Than Loans, Gifts And Honoraria). You received income from your land development company which you reported on Schedule D. On the summary page, under Schedule D--Income, check the box for "Schedule Completed And Attached."

Schedule E--Loans (Received Or Outstanding During The Reporting Period). You did not have any reportable outstanding loans and did not complete Schedule E. On the summary page, under Schedule E--Loans, check the box for "No Reportable Interests."

Schedule F--Gifts. You did not receive any reportable gifts and did not complete Schedule F. On the summary page, under Schedule F--Gifts, check the box for "No Reportable Interests."

Schedule G--Honoraria. You did not receive any honoraria and did not complete Schedule G. On the summary page, under Schedule G--Honoraria, check the box for "No Reportable Interests."

Schedule H--Commission Income, Income And Loans To Business Entities Or Trusts And Income From Rental Property. Your pro rata share of a payment received by your land development company from a client located in your jurisdiction was \$10,000. You reported the name of this client on Schedule H-2. On the summary page, under Schedule H--Commission Income, Income And Loans To Business Entities Or Trusts And Income From Rental Property, check the box for "Schedule Completed And Attached."

NAME _____ (Filer's Name)

The Following Summary Must Be Completed By All Filers

DO NOT COMPLETE THIS SUMMARY PAGE UNTIL YOU HAVE CAREFULLY REVIEWED ALL SCHEDULES AND THE INSTRUCTIONS FOR EACH SCHEDULE.

	SCHEDULE COMPLETED AND ATTACHED	NO REPORTABLE INTERESTS
Schedule A - INVESTMENTS (Which Are <u>Not</u> Held Through A Business Entity Or Trust)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Schedule B - INTERESTS IN REAL PROPERTY (Which Are <u>Not</u> Held Through A Business Entity Or Trust)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Schedule C-1 - INTERESTS IN REAL PROPERTY HELD BY A BUSINESS ENTITY OR TRUST	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Schedule C-2 - INVESTMENTS HELD BY A BUSINESS ENTITY OR TRUST	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Schedule D - INCOME (Other Than Loans, Gifts And Honoraria)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Schedule E - LOANS (Received Or Outstanding During The Reporting Period)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Schedule F - GIFTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Schedule G - HONORARIA	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Schedule H - COMMISSION INCOME, INCOME AND LOANS TO BUSINESS ENTITIES OR TRUSTS AND INCOME FROM RENTAL PROPERTY	<input checked="" type="checkbox"/>	<input type="checkbox"/>

NOTE: AFTER THE SUMMARY PAGE HAS BEEN COMPLETED, PLEASE DISCARD THOSE SCHEDULES ON WHICH YOU HAVE NO REPORTABLE INTERESTS.

VERIFICATION

I have used all reasonable diligence in preparing this statement. I have reviewed the statement and to the best of my knowledge the information contained herein and in the attached schedules is true and complete.

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

Executed on March 1, 19 91, at Sacramento, California

SIGNATURE _____ (Filer's Signature)

INFORMATION FOR COMPLETING SCHEDULE A: Investments **(Which Are Not Held By A Business Entity Or Trust)**

You must report as an investment any financial interest in any business entity located in or doing business in your jurisdiction in which you or your immediate family (your spouse and your dependent children) had a direct, indirect or beneficial interest aggregating \$1,000 or more during the reporting period. In addition, if you had a 10% or greater interest in a business entity, please see Schedules C-1, C-2 and H-2.

A business entity is located in or doing business in the jurisdiction if it, a parent or subsidiary, or a related business entity:

- Manufactures, distributes or sells products or services on a regular basis in the jurisdiction; or
- Plans to do business in the jurisdiction; or
- Has done business in the jurisdiction within the previous two years; or
- Has an interest in real property in the jurisdiction; or
- Has offices in the jurisdiction

The most common types of investments are:

- Sole proprietorships
- Partnerships
- Stocks, bonds, warrants and options including those held in margin or brokerage accounts
- Individual Retirement Accounts (IRAs) which are invested in reportable business entities or real property

You are not required to report investments in:

- Bank accounts, savings accounts and money market accounts
- Insurance policies
- Shares in a credit union
- Government bonds
- Diversified mutual funds registered with the Securities and Exchange Commission (SEC)
- Common trust funds created under California Financial Code Section 1564
- Individual Retirement Accounts (IRAs) invested in non-reportable interests such as insurance policies, diversified mutual funds or government bonds

Reporting Individual Retirement Accounts (IRA'S)

See Appendix II, page 31 for information

EXAMPLE, SCHEDULE A

Assume that:

- On February 1, you purchased \$800 worth of stock in XYZ Corporation.
- On March 1, the stock had a market value of \$1,200.
- On May 1, you sold the stock for \$900.
- You have a 50% partnership interest in ABC Land Developers, valued at \$250,000, which you did not acquire or dispose of during the reporting period.
- Your spouse has a 50% ownership interest in the Summer Place Inn, valued at \$80,000.
- All of the business entities do business in your jurisdiction.

The stock in XYZ Corporation must be listed because your investment was worth \$1,000 or more for part of the period covered by the statement. Your partnership in ABC Land Developers, and your spouse's interest in Summer Place Inn must be disclosed.

Schedule A should be completed as follows:

NAME OF BUSINESS ENTITY XYZ Corporation		VALUE <input checked="" type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000 Ownership Interest <input checked="" type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*
NATURE OF INVESTMENT, E.G. COMMON STOCK, PARTNERSHIP INTEREST Common Stock	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: <u>2/1/90</u> Date Disposed: <u>5/1/90</u>	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Manufactures Widgets		
NAME OF BUSINESS ENTITY ABC Land Developers		VALUE <input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input checked="" type="checkbox"/> Over \$100,000 Ownership Interest <input type="checkbox"/> Less than 10% <input checked="" type="checkbox"/> 10% or greater*
NATURE OF INVESTMENT, E.G. COMMON STOCK, PARTNERSHIP INTEREST Partnership	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: _____ Date Disposed: _____	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Land Developer		
NAME OF BUSINESS ENTITY Summer Place Inn		VALUE <input type="checkbox"/> \$1,000-\$10,000 <input checked="" type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000 Ownership Interest <input type="checkbox"/> Less than 10% <input checked="" type="checkbox"/> 10% or greater*
NATURE OF INVESTMENT, E.G. COMMON STOCK, PARTNERSHIP INTEREST Spouse's Ownership Interest	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: _____ Date Disposed: _____	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Restaurant		

NOTE: You may be required to report on Schedule D any salary, commission, distribution or other income (\$250 or more) received by you or your spouse from business entities listed on Schedule A.

*If you have checked this box, you must report any interests in real property and investments held by the business entity or trust on Schedules C-1 and C-2. In addition, if your pro rata share of the gross income from any one source was \$10,000 or more, you may be required report the name of that source on Schedule H-2.

INFORMATION FOR COMPLETING SCHEDULE B: Interests In Real Property (Which Are Not Held By A Business Entity Or Trust)

You must report interests in real property located in your jurisdiction, in which you or your immediate family had a direct, indirect or beneficial interest aggregating \$1,000 or more at any time during the reporting period.

Jurisdiction for reporting interests in real property:

Judges, court commissioners, state officeholders and state agency officials and employees have statewide jurisdiction and must report real property located anywhere within the State of California. An interest in real property is in the jurisdiction of a city or county if it is located in, or within two miles of, the city or county, or within two miles of any land owned or used by the city or county.

Interest in real property include:

- A leasehold interest*
- A beneficial ownership interest
- A deed of trust
- An easement
- An option to acquire any of the above
- An interest in real property held by an IRA in which you have a 10% or greater interest

You are not required to disclose the following:

- Any residence which you utilize exclusively as your personal residence, unless it is also a place of business, e.g., family farm, retail business, or vacation rental, in which case you are required to disclose only the value of that portion of the property which is used in connection with your business activities.
- Interests in real property acquired by a blind trust pursuant to FPPC Regulation 18235. (For a discussion of blind trusts, see Appendix I, page 30.)

Reporting Interests in Rental Property and Income from Rental Property

If you or your immediate family have an interest in a rental property directly, i.e., not through a business entity, you must report:

- The property on Schedule B;
- Your share of the total amount of rental income received from the property on Schedule D; and
- If your ownership interest is 10% or greater, the name of any tenant who paid rent of which your share was \$10,000 or more on Schedule H-3.

If you or your immediate family own a 10% or greater interest in a business entity, such as a partnership or joint venture, which owns real property, you must report:

- The business entity on Schedule A;
- The property held by the business entity on Schedule C-1;
- Your share of the total amount of income, including rents, received from the business entity on Schedule D;
- The name of any client or customer who provided income to the business entity of which your pro rata share was \$10,000 or more on Schedule H-2.

*An interest in a lease on real property is reportable if the value of the leasehold interest is \$1,000 or more. The value of the leasehold interest is the total amount of rent owed by you during the reporting period, or on an assuming office statement, during the prior 12 months. No leasehold interest with a value of less than \$1,000 need be reported. When reporting a leasehold interest, you must include the address or other precise location of the leased property and the date upon which the lease became effective, if this occurred during the reporting period.

EXAMPLE, SCHEDULE B

Assume that:

- You have a 25% interest in a commercial rental building at 14738 Spruce Street, Little Town. The fair market value of your interest in the building is \$85,000 and you did not acquire or dispose of the property during the reporting period.
- During the reporting period, you paid \$4,500 to obtain an option to buy a parcel of land described as AP 5748 47390, in Little Town, Blossom County.
- You hold a \$10,500 interest in a deed of trust on property located at 7667 Mosswood Circle, Little Town, Blossom County.
- All pieces of property are located within your jurisdiction.

Schedule B should be completed as follows:

STREET ADDRESS OR PRECISE LOCATION OF PROPERTY 14738 Spruce Street		CITY Little Town	FAIR MARKET VALUE <input type="checkbox"/> \$1,000-\$10,000 <input checked="" type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST Ownership			
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: _____ Date Disposed: _____	If Rental Property, Ownership Interest Is	<input type="checkbox"/> Less than 10% <input checked="" type="checkbox"/> 10% or greater*
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY AP 5748 47390		CITY Little Town	FAIR MARKET VALUE <input checked="" type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST Option To Buy			
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: 2/2/90 Date Disposed: _____	If Rental Property, Ownership Interest Is	<input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY 7667 Mosswood Circle		CITY Little Town	FAIR MARKET VALUE <input type="checkbox"/> \$1,000-\$10,000 <input checked="" type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST Deed Of Trust			
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: _____ Date Disposed: _____	If Rental Property, Ownership Interest Is	<input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*

NOTE: You may be required to report on Schedule D any income (\$250 or more) received by you or your spouse from rental property listed on Schedule B.

*If you have a 10% or greater interest in a rental property, you may have additional reporting requirements on Schedule H-3.

**INFORMATION FOR COMPLETING SCHEDULES C-1 and C-2:
Interests In Real Property And Investments
Held By Business Entities Or Trusts**

If, during the reporting period, you or your immediate family had a 10% or greater interest in a business entity or in a trust, and

If, during the reporting period, the business entity or trust held interests in real property or investments:

1. You must report such interests in real property if your pro rata share in any interest in real property is \$1,000 or more and if the real property is located in your jurisdiction (report this on Schedule C-1); and
2. You must report such investments if your pro rata share of any investment is \$1,000 or more and the investment is in a business entity located in, or doing business in, your jurisdiction (report this on Schedule C-2).

In addition, you must report the business entity holding such investments or interests in real property as an investment on Schedule A.

Reporting Assets Held By A Trust: You must disclose investments and interests in real property held by any trust in which you have a 10% or greater interest, if your pro rata share of the investment or interest in real property is \$1,000 or more. Pursuant to FPPC Regulation 18234, you have an interest in a trust if you are:

1. *A maker and :*
 - a. can revoke or terminate the trust; or
 - b. have retained any rights to the income or principal of the trust or retained any reversionary or remainder interest; or
 - c. have retained any power of appointment including the power to change the beneficiaries.
2. *A beneficiary and:*
 - a. presently receive income; or
 - b. have an irrevocable future right to receive income or principal.

If you are only a trustee, you do not have a reportable interest in the trust.

EXAMPLE, SCHEDULES C-1 and C-2

Assume that:

- You have a 50% partnership interest in ABC Land Developers worth \$250,000.
- ABC Land Developers owns real property worth \$300,000 located within your jurisdiction, and common stock worth \$3,000 in Ajax Building Materials, which does business in your jurisdiction. Neither the real property nor the investments were acquired or disposed of during the reporting period.

Your 50% interest in ABC Land Developers must be reported on Schedule A. The real property and common stock held by ABC Land Developers must be reported on Schedules C-1 and C-2 as follows:

SCHEDULE C-1

Interests In Real Property Held By A Business Entity Or Trust

INTERESTS IN REAL PROPERTY HELD BY: ABC Land Developers
(Name Of Business Entity Or Trust Holding The Real Property)

STREET ADDRESS OR PRECISE LOCATION OF PROPERTY AP 029 589202	CITY Little Town	FAIR MARKET VALUE <input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input checked="" type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST Ownership		
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: _____ Date Disposed: _____	

SCHEDULE C-2

Investments Held By A Business Entity Or Trust

INVESTMENTS HELD BY: ABC Land Developers
(Name Of Business Entity Or Trust Holding The Investment(s))

NAME OF BUSINESS ENTITY Ajax Building Materials		VALUE <input checked="" type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INVESTMENT E.G., COMMON STOCK, PARTNERSHIP Common Stock	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: _____ Date Disposed: _____	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Manufactures Building Supplies		

INFORMATION FOR COMPLETING SCHEDULE D: Income (Other Than Loans, Gifts And Honoraria)

Important: Under the Political Reform Act, reportable income is different from income for tax purposes.

You must report your gross income and your community property interest in your spouse's gross income. Gross income is the total amount of income before deducting expenses, losses or taxes. Income aggregating \$250 or more received from any source located in or doing business in your jurisdiction must be disclosed.

A source of income is located in or doing business in the jurisdiction if it is a parent, subsidiary, or a related business entity:

- Manufactures, distributes or sells products or services on a regular basis in the jurisdiction.
- Plans to do business in the jurisdiction.
- Has done business in the jurisdiction within the previous two years.
- Has an interest in real property in the jurisdiction.
- Has an office in the jurisdiction.

Reportable income includes:

- Commission income. (See definition and explanation on page 27.)
- Salary/wages, per diem, reimbursement for expenses (see exclusions below).
- Income from a business entity and your pro rata share of the total gross payments received by a business entity (including rental property) or a trust in which you or your spouse had an ownership interest of 10% or more.
- Your community property interest (**50%**) in your spouse's income.
- Proceeds from any sale, including the sale of a house or car. (The total sale price is reportable regardless of any obligation you might have to pay on loans secured by the property.)
- Interest (see exclusions below).
- Rental income.
- Prizes or awards not disclosed as gifts.
- Forgiveness of a loan or other indebtedness.
- Loan payments received by you.

You are not required to disclose the following types of income:

- Salary or reimbursements for expenses and per diem from a federal, state or local government agency.
- Reimbursement for travel expenses and per diem received from a bona fide educational, academic or charitable organization.
- Campaign contributions.
- A devise or inheritance. (*However, inheritance of an investment or an interest in real property may be required to be reported on Schedule A or B.*)
- Dividends, interest or other return on a security which is registered with the Securities and Exchange Commission.
- Payments received under an insurance policy.
- Interest, dividends or premiums on a time or demand deposit in a financial institution, shares in a credit union, an insurance policy, or a bond or other debt instrument issued by a government agency.
- Income of dependent children.
- Alimony or child support payments.
- Redemption of a mutual fund.
- Payments received under a defined benefit pension plan qualified under Internal Revenue Code Section 401(a).
- Proceeds from the sale of securities or commodities futures sold on a stock or commodity exchange if the purchaser is not known.
- Income from assets acquired by a blind trust. (For a discussion of blind trusts, see Appendix I, page 30 of this manual.)

EXAMPLE, SCHEDULE D

Assume that you received income from the following sources during the reporting period:

- \$2,000 in dividends from stock registered with the Securities and Exchange Commission.
- \$1,500 in interest and repayment of a loan from Ace Plumbing, which is not located in or doing business in your jurisdiction.
- \$1,200 per diem from the city for your services as a city employee.
- \$4,800 in total rental income from a duplex, which is in your jurisdiction.
- Your spouse received \$18,000 in salary from General Telephone Company, a manufacturing firm which sells products in your jurisdiction.

Of the income you received, the following is not reportable income:

- The dividend income, because the stock is registered with the Securities and Exchange Commission.
- The interest and repayment from Ace Plumbing because it is not located in your jurisdiction, nor does it do business in your jurisdiction.
- The per diem from the city for your service as a city employee because salary from a governmental agency is not reportable.

With respect to your spouse's income, only your community property interest (50%) is reportable. The source of your spouse's income must be disclosed.

Schedule D should be completed as follows:

GROSS INCOME RECEIVED:

<small>NAME OF THE SOURCE OF INCOME</small> <p style="text-align: center;">Duplex</p>	<input type="checkbox"/> \$250 - \$1,000
<small>ADDRESS</small> <p style="text-align: center;">104 & 106 Main Street, Little Town, CA</p>	<input checked="" type="checkbox"/> \$1,001 - \$10,000
<small>NATURE OF BUSINESS, IF ANY</small> <p style="text-align: center;">Rental Property</p>	<input type="checkbox"/> Over \$10,000
<small>DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED</small> <p style="text-align: center;">Rents</p>	
<small>NAME OF THE SOURCE OF INCOME</small> <p style="text-align: center;">General Telephone Company</p>	<input type="checkbox"/> \$250 - \$1,000
<small>ADDRESS</small> <p style="text-align: center;">567 Main Street, Little Town, CA</p>	<input checked="" type="checkbox"/> \$1,001 - \$10,000
<small>NATURE OF BUSINESS, IF ANY</small> <p style="text-align: center;">Manufactures Telephone Equipment</p>	<input type="checkbox"/> Over \$10,000
<small>DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED</small> <p style="text-align: center;">Spouse's</p>	

INFORMATION FOR COMPLETING SCHEDULE E: Loans (Received Or Outstanding During The Reporting Period)

You must report loans, including real estate loans and margin accounts, received by either yourself or your spouse aggregating \$250 or more from a single source which is located in, or doing business in, your jurisdiction. All reportable loans received or outstanding during the reporting period must be disclosed. Note: Multiple loans from a single source must be aggregated.

A source of income is located in or doing business in the jurisdiction if it or a parent, subsidiary, or a related business entity:

- Manufactures, distributes or sells products or services on a regular basis in the jurisdiction.
- Plans to do business in the jurisdiction.
- Has done business in the jurisdiction within the previous two years.
- Has an interest in real property in the jurisdiction.
- Has an office in the jurisdiction.

INFORMATION FOR COMPLETING SCHEDULE E: Loans (Continued)

You are not required to disclose the following loans:

- Any loan from a commercial lending institution used to purchase, refinance the purchase of, or for improvements to, your principal place of residence if the loan was made in the lender's regular course of business on terms available to members of the public without regard to official status.
- Loans from a commercial lending institution in the normal course of business which did not exceed \$10,000 at any time during the reporting period. (Multiple loans from a commercial lending institution must be aggregated.)
- Any indebtedness created as part of a retail installment or credit card transaction made in the creditor's regular course of business on terms available to the public without regard to official status if the aggregate amount owed to the creditor did not exceed \$10,000 at any time during the reporting period.
- Any loan from your spouse, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, or first cousin or the spouse of any such person, except that a loan from any such person is reportable if the person is acting as an intermediary or agent for any person not covered by this provision.

EXAMPLE, SCHEDULE E

Assume that:

- You received an equity loan in the amount of \$15,000 from Greatest Savings and Loan on your principal place of residence to consolidate your bills and to take a long needed vacation.
- In 1983, you bought a parcel of land and financed it through a savings and loan on their standard terms. The savings and loan is located in your jurisdiction. At the beginning of the year, you owed the savings and loan \$12,000, and at the end of the year you owed \$9,500.

You must report:

- The equity loan on your principal place of residence because the loan amount was over \$10,000 and the money was not used to refinance or for improvements to your principal residence.
- The debt to the savings and loan at the highest amount owed during the reporting period (\$12,000). Although this loan was from a commercial lending institution in the normal course of business, it is reportable because the amount owed exceeded \$10,000 during the reporting period.

Schedule E should be completed as follows:

NAME OF LENDER		AMOUNT OF HIGHEST BALANCE DURING THE REPORTING PERIOD:	
Worldwide Savings & Loan		<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> Over \$10,000	
ADDRESS 123 Main Street, Little Town			
NATURE OF BUSINESS, IF ANY Lending Institution	WAS THE ENTIRE LOAN REPAID DURING THE REPORTING PERIOD? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO		
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) Personal Residence <input type="checkbox"/> NONE		INTEREST RATE 14% <input type="checkbox"/> NONE	
NAME OF LENDER Greatest Savings & Loan		<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> Over \$10,000	
ADDRESS 123 Main Street, Little Town			
NATURE OF BUSINESS, IF ANY Lending Institution	WAS THE ENTIRE LOAN REPAID DURING THE REPORTING PERIOD? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO		
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) AP #888920, Little Town <input type="checkbox"/> NONE		INTEREST RATE 18% <input type="checkbox"/> NONE	

INFORMATION FOR COMPLETING SCHEDULE F: Gifts

IMPORTANT

Effective January 1, 1991, new prohibitions and limitations will be imposed on gifts and honoraria received by elected state and local officials, state agency officials, members of state boards and commissions, and certain employees of state agencies. These new provisions are discussed at the front of this manual in the section entitled "1991 Legislative Changes."

WARNING: These new prohibitions and limitations do not affect the requirements for disclosing gifts and honoraria received.

"Gift" means anything of value, whether tangible or intangible, for which equal or greater value is not provided. You must disclose gifts with an aggregate value of \$50 or more received during the reporting period from a single source, without regard to the location of the donor (inside or outside your jurisdiction). Any number of gifts from one person, the values of which add up to \$50 or more during the reporting period, must be disclosed.

It is the acceptance of the gift, and not the ultimate use to which it is put, that imposes a reporting obligation on you. Thus, you must report a gift even if you never make use of it (unless you return the gift or donate it to a charity as noted on page 24) or if you give it away to another person. (Note: There are special rules for reporting gifts of free passes or tickets. (Commission Regulation 18726.3.)) If the exact amount of the gift is not known, you must make a good faith estimate of the item's fair market value. Listing the value of the gift as "over \$50" or "value unknown" is not adequate disclosure. Gifts are reportable without regard to where the donor is located.

IMPORTANT: If you receive a gift through an intermediary, you must disclose the name, address and business activity of both the donor and the intermediary.

EXCEPTIONS FROM DISCLOSURE

You are not required to disclose the following types of gifts:

- Gifts of hospitality involving food, drink or occasional lodging provided in an individual's home.
- Gifts equal in value exchanged between you and an individual, other than a lobbyist, on holidays, birthdays, or similar occasions.
- Gifts of informational material, such as books, pamphlets, reports, calendars or periodicals.
- Gifts from your spouse, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, aunt, uncle, niece, nephew, or first cousin or the spouse of any such person, provided that a gift from any such person must be disclosed if the person is acting as an agent or intermediary for a reportable source of income.
- A bequest or inheritance. (However, an inheritance of an investment or an interest in real property may be required to be reported on Schedule A or B.)
- Gifts which are not used and which, within 30 days after receipt, are returned to the donor or delivered to a charitable organization without being claimed as a charitable contribution for tax purposes.
- Personalized plaques and trophies with an individual value of less than \$250.
- Campaign contributions.
- Food, beverage, and necessary accommodations received directly in connection with an event at which you gave a speech, participated in a panel, or provided a similar service.

EXAMPLE, SCHEDULE F

Assume that:

- You received season tickets worth \$200 to professional baseball games from Valley Pipe Systems. You used the tickets.
- You received a complimentary dinner worth \$75 from Le Connoisseur Restaurant.

Schedule F should be completed as follows:

	DATE(S) RECEIVED:	VALUE(S):	DESCRIPTION(S) OF GIFT(S):
<small>NAME OF DONOR</small> Valley Pipe Systems	March 1, 1990	\$200	Season tickets to Hometown A's baseball team
<small>ADDRESS</small> 200 E. Fifth, Hometown			
<small>NATURE OF BUSINESS, IF ANY</small> Manufactures Irrigation & Plumbing Supplies			
<small>NAME OF DONOR</small> Le Connoisseur Restaurant	September 15, 1990	\$75	Complimentary dinner
<small>ADDRESS</small> 1100 Broadway, Little Town			
<small>NATURE OF BUSINESS, IF ANY</small> Restaurant			

INFORMATION FOR COMPLETING SCHEDULE G: Honoraria

IMPORTANT

Effective January 1, 1991, new prohibitions and limitations will be imposed on gifts and honoraria received by elected state and local officials, state agency officials, members of state boards and commissions, and certain employees of state agencies. These new provisions are discussed at the front of this manual in the section entitled "1991 Legislative Changes."

WARNING: These new prohibitions and limitations do not affect the requirements for disclosing gifts and honoraria received.

"Honorarium" means a payment for speaking at an event, participating in a panel or seminar, or performing a similar service. You must report all honoraria aggregating \$50 or more received from a single source during the reporting period.

Payment or reimbursement for travel in connection with an event: Payment or reimbursement for travel in connection with an event at which you gave a speech, participated in a panel or seminar or performed a similar service is reportable as an honorarium if the travel was outside California. Payment or reimbursement for travel in connection with such an event within California is not reportable.

In addition, any extra benefits (such as an extra night's lodging) which were not provided directly in connection with your participation in the event must be reported as a gift.

Payment or reimbursement for all other travel: Payment or reimbursement for travel which is not in connection with an event at which you gave a speech, participated in a panel or seminar or performed a similar service, must be reported as a gift or as income unless it is from a state, local or federal government agency or from a bona fide educational or charitable organization.

Reportable honoraria include:

- Payments of \$50 or more
- Extra benefits provided which were not provided directly in connection with the event
- Reimbursement or payment for travel outside California

You are not required to report the following benefits provided directly in connection with the event in which you participated:

- Free admission
- Accommodations directly in connection with the event
- Food and beverage at the event
- Similar nominal benefits
- Reimbursement or payment for travel within California

If you are a state agency employee who wishes to accept an honorarium from a lobbyist who is registered to influence your agency, consult FPPC Regulation 18623.

EXAMPLE, SCHEDULE G

Assume that you address the annual convention of the American Growers Association in Mudville, California. The Association pays you:

- \$300 for speaking
- \$100 to reimburse your travel expenses

You are provided with dinner at the event before your speech.

You are not required to report:

- The \$100 reimbursement for travel in California
- The value of the dinner

Schedule G should be completed as follows:

DATE(S): VALUE(S): DESCRIPTION(S) OF SERVICE(S) RENDERED:

NAME OF SOURCE			
American Growers Association	10/1/90	\$300	Keynote speaker at annual convention
ADDRESS			
77 Green Lane, Mudville,			
NATURE OF BUSINESS ACTIVITY, IF ANY			
Produce Growers			

INFORMATION FOR COMPLETING SCHEDULE H-1: Commission Income

Brokers, agents or salespersons are required to disclose the names of sources of commission income if their pro rata share of the gross commission income amounts to \$10,000 or more from a single source. **No ownership interest in a business entity is necessary to require disclosure or disqualification under this provision.** "Commission income" means gross payments received as a result of services rendered as a broker, agent or salesperson. Persons who must report commission income include: insurance brokers or agents, real estate brokers or agents, travel agents or salespersons, stockbrokers and retail or wholesale salespersons. The "source" of commission income may be a client or customer or it may be a broker, a company or other business entity through which the goods or services were sold or it may be both. (See example below.) NOTE: If you have reported yourself or your employer as a source of commission income on Schedule D, you are not required to itemize yourself or your employer as a source of income on Schedule H-1.

During the reporting period, did you or your spouse receive "commission income" for services rendered as a broker, agent or salesperson?

NO --- You are not required to complete Schedule H-1.

YES --- You must provide the name of each individual or entity which:

- Is located in, or doing business in, your jurisdiction; and
- Was a source of income, provided that your pro rata share of such receipts was \$10,000 or more.

EXAMPLE, SCHEDULE H-1

Assume that:

- You are an agent for Smith and Jones Insurance Company. You sold a Businessmen's Insurance Company insurance policy to XYZ Company. You received commission income of \$15,000 from the transaction.
- Your spouse is a real estate broker for Goldwater Realty and received a commission of \$20,000 from the Grand Company.

You would:

- Report both XYZ Company and Businessmen's Insurance Company as sources of commission income because each was a source of \$10,000 or more. Smith and Jones is disclosed on Schedule D as a source of commission income, and on Schedule H-1 as the business entity through which you received the income.
- Report Grand Company, your spouse's client, because your community property share (50%) of the gross receipts amounted to \$10,000 and would meet the reporting threshold. You would also report your community property share of your spouse's income from Goldwater Realty on Schedule D as a source of income.

Schedule H-1 would be completed as follows:

NAME OF BUSINESS ENTITY Smith and Jones Insurance Company
NAMES OF SOURCES OF INCOME XYZ Company
Businessmen's Insurance Company
NAME OF BUSINESS ENTITY Goldwater Realty
NAMES OF SOURCES OF INCOME Grand Company

INFORMATION FOR COMPLETING SCHEDULES H-2 AND H-3: Income And Loans To Business Entities Or Trusts And Income From Rental Property

If, during the reporting period, you and your spouse owned an aggregate interest of 10% or more in any business entity (including rental property) or a trust, you must provide the name of each individual or entity which:

- Is located in, or is doing business in, your jurisdiction; and
- Was a source of income, including loans received or outstanding, to the business entity or trust, provided that your pro rata share of such payments or receipts was \$10,000 or more (Schedule H-2), or
- Made rent payments, provided that your pro rata share of such receipts was \$10,000 or more (Schedule H-3).

IMPORTANT: *The requirement to report sources of income to a business entity or trust is determined by the location of the source of loan or income--not by the location of the business entity or trust which received the loan or income or by the location of the rental property.*

If the business entity in which you have a 10% or greater interest is located in or doing business in your jurisdiction, it must also be reported on Schedule A and you may be required to complete Schedules C-1 and C-2. Your pro rata share of the gross income to the business entity must be reported on Schedule D.

If the rental property in which you have a 10% or greater interest is located in your jurisdiction, it must be reported on Schedule B. Your pro rata share of the gross rental income from the property must be reported on Schedule D.

FPPC Regulation 18740 contains information regarding the procedure for obtaining an exemption from the disclosure requirement of clients' names which are legally recognized as privileged under California law. You may obtain a copy of Regulation 18740 by contacting the Fair Political Practices Commission.

NOTE: If your pro rata share of income or a loan to a business entity or trust is \$250 or more, you may be required to disqualify yourself from decisions affecting that source of income or loan, even though you are not required to report it.

EXAMPLE, SCHEDULE H-2

Assume that:

- During the reporting period ABC Land Developers, in which you have a 50% partnership interest, received a loan from the Little Town Bank in the amount of \$30,000. The bank has a branch which is located in your jurisdiction.
- ABC Land Developers received a gross payment from John H. Brown, a customer, in the amount of \$15,000. Mr. Brown is doing business in your jurisdiction.
- Your spouse owns 100% of a law firm. A client paid your spouse \$20,000 during the reporting period. This client is doing business in your jurisdiction.

You would:

- Report the loan to ABC Land Developers from the Little Town Bank because your pro rata share (50%) of the \$30,000 loan is \$15,000 and meets the \$10,000 reporting threshold.
- Not report the name of John H. Brown, a customer, because your pro rata share (50%) of his \$15,000 gross payment is only \$7,500 and does not meet the \$10,000 reporting threshold. However, Mr. Brown is a source of income to you, and you may have to disqualify yourself from decisions affecting Mr. Brown.
- Report your pro rata share \$10,000 (50%) of the \$20,000 paid to your spouse’s law firm.

Schedule H-2 would be completed as follows:

NAME OF BUSINESS ENTITY OR TRUST ABC Land Developers	ADDRESS OF BUSINESS ENTITY OR TRUST 5744 Tenth Street, Little Town
NATURE OF BUSINESS, IF ANY Land Developers	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY OR TRUST Little Town Bank	
NAME OF BUSINESS ENTITY OR TRUST Smith and Jones	ADDRESS OF BUSINESS ENTITY OR TRUST 1261 High Street, Little Town
NATURE OF BUSINESS, IF ANY Law Firm	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY OR TRUST Joseph Brown and Associates	

EXAMPLE, SCHEDULE H-3

Assume that:

- You own 25% of a commercial building located in your jurisdiction from which rental income was received from a single tenant in the amount of \$40,000.

You would:

- Report the name of the rental tenant who provided payments in the amount of \$40,000 to the commercial building because your pro rata share (25% of the rental payments) is \$10,000 and would meet the reporting threshold.

Schedule H-3 would be completed as follows:

ADDRESS OF RENTAL PROPERTY 14738 Spruce Street	CITY Little Town
NAMES OF RENTERS Sylvan Taylor, M.D.	

APPENDIX I

BLIND TRUSTS

According to FPPC Regulation 18235, if you have a direct, indirect or beneficial interest in a blind trust that meets certain standards, you are not required to disclose your pro rata share of the trust's assets acquired after the trust meets the standards, or income derived from such assets. However, you must continue to disclose the assets originally transferred into the blind trust and income from the original assets until the trustee notifies you that they have been replaced. To qualify as a blind trust:

1. The trustee must be a disinterested party and someone other than a member of your family;
2. The trustee must not disclose any information regarding the replacement assets, except for certain minimal tax information;
3. The trustee must be given complete discretion to manage the trust without consulting or notifying you; and
4. The trustee must be required to notify you of the date of disposition and value at disposition of any original investments or interests in real property.

If a blind trust is revoked while you are a public official, or if you learn of any replacement assets of the trust, you must amend your most recent statement of economic interests, disclosing the date of revocation and/or the previously unreported information. When completing a statement of economic interests you must disclose the existence of the blind trust, its date of creation and name of the trustee. You must also attach a statement, signed by the trustee, indicating under penalty of perjury that no information regarding assets or income of the trust has been revealed to you other than information allowed under the regulation and that the trust conforms with the standards. If you wish to create a blind trust, we suggest that you and your trustee review FPPC Regulation 18235 together.

APPENDIX II

REPORTING INDIVIDUAL RETIREMENT ACCOUNTS (IRA'S)

TYPES OF INDIVIDUAL RETIREMENT ACCOUNTS THAT ARE REQUIRED TO BE REPORTED:

- An IRA in which your investment is \$1,000 or more, IF the assets of the IRA are invested in real property, or the types of business entities that the Act requires be disclosed - e.g., stocks, bonds, warrants, options.
- In addition, if your investment of \$1,000 or more makes up 10 percent or more of the total assets of the IRA, you must disclose on Schedule A any specific investments held by the IRA, if your pro rata share of a specific investment is \$1,000 or more.

Example: You have a \$1,000 investment in an IRA which has assets of over \$1,000,000. The assets held by the IRA are invested in real estate deeds of trust. You must disclose the IRA on Schedule A. However, because your total investment in the IRA does not represent 10 percent or more of the the total funds of the IRA, you are not required to disclose any of the assets held by the IRA.

TYPES OF INDIVIDUAL RETIREMENT ACCOUNTS WHICH ARE NOT REQUIRED TO BE REPORTED:

- If the assets of the IRA consist solely of deposits in financial institutions, insurance policies or annuities, investments in registered mutual funds, and government bonds or other government debt securities.

Example: You have a \$25,000 investment in an IRA established by your bank. All the IRA funds are invested in certificates of deposit and treasury notes.

IMPORTANT REMINDERS WHEN COMPLETING THE FORM 721

1. Be sure to complete the cover page and indicate whether you are filing an assuming office, annual, leaving office or candidate statement, .
2. Be sure to complete the Summary Page accurately. Make sure that a box has been checked for each schedule indicating that either the schedule is completed and attached or you have no reportable interests.
3. If you reported on Schedules C-1 and C-2 Interests In Real Property Or Investments Held By A Business Entity Or Trust, be sure to report on Schedule A your investment in the business entity holding those interests.
4. If you hold a deed of trust, report it on Schedule B and not on Schedule A.
5. Be sure to give the precise location (street address or assessor's parcel number, and city) for all interests in real property reported on Schedule B or C-1.
6. If you reported any investments on Schedule A which provided you or your spouse with income (salary, commission, distribution, etc.), report the income on Schedule D.
7. If you reported income to your spouse on Schedule D, report the name of your spouse's employer or other source of income and not "Jane/John Doe, spouse."
8. If you received income from a deed of trust, report the income on Schedule D.
9. If you are a broker, agent or salesperson, read the explanations for reporting commission income on Schedules D and H-1 located on pages 20 and 27.
10. If your pro rata share of gross rent paid by any single source was \$10,000 or more and you had a 10% or greater interest in the rental property, in addition to reporting the income on Schedule D, report the name of the renter on Schedule H-3.
11. If you acquired or disposed of any investments or interests in real property during the reporting period, report the interests and indicate the month, day and year acquired or disposed.

**Be sure to SIGN, DATE and INDICATE THE CITY AND STATE
OF VERIFICATION on PAGE 2 OF YOUR STATEMENT.**

Important Notice To Filers: The Political Reform Act is intended to prevent conflicts of interest by requiring public officials to disclose certain personal financial interests which could foreseeably cause conflicts. In addition, as a public official, you may be required to disqualify yourself from making, participating in, or attempting to influence any governmental decision which will affect any of your financial interests, not only those which you are required to disclose. The Fair Political Practices Commission's *Guide to the Political Reform Act: California's Conflict of Interest Law for Public Officials* explains what a conflict of interest is, and when disqualification is required by law. Failure to file your statement by the filing deadline may result in penalties, including but not limited to late fines. This statement is a public document open for inspection and reproduction by any person. Copies must be provided at a cost not to exceed 10 cents per page.

All of the information required by this form is mandatory, is required by the provisions of the Political Reform Act, Government Code Sections 81000, et seq., and will be available to any member of the public upon request. This information is to be used to reveal to public scrutiny certain financial interests of public officials in order to disclose potential conflicts of interest and to aid in the prevention of actual conflicts of interest.

Date Received by.FPPC

FORM 721

IMPORTANT:
Statement must be date
stamped when received by
filing official

STATEMENT OF ECONOMIC INTERESTS

A Public Document

1990/91

PLEASE TYPE OR PRINT IN INK

NAME

TELEPHONE NUMBER

()

MAILING ADDRESS

STREET

CITY

ZIP CODE

OFFICE HELD OR SOUGHT (Check One):

STATE OF CALIFORNIA OFFICE: _____

JUDICIAL BRANCH COUNTY: _____ COURT: _____

CHECK ONE: JUDGE COURT COMMISSIONER

COUNTY OFFICE: _____ COUNTY: _____

CITY OFFICE: _____ CITY: _____

TYPE OF STATEMENT (Check the Appropriate Box(es)):

SCHEDULES TO BE COMPLETED

ASSUMING OFFICE STATEMENT
(For Newly-Elected and Newly-Appointed Officials ONLY)*

ELECTED OFFICIAL (Other than elected state officers assuming office in December or January). File no later than 30 days after assuming office.

Date Assumed Office _____
mo. day yr.

APPOINTED OFFICIAL Not subject to confirmation by the State Senate or the Commission on Judicial Appointments. File no later than 10 days after assuming office.

Date Assumed Office _____
mo. day yr.

APPOINTED OFFICIAL Subject to confirmation by the State Senate or the Commission on Judicial Appointments. File no later than 10 days after appointment or nomination.

Date Appointed _____
mo. day yr.

ANNUAL STATEMENT

State officers and all judges and court commissioners file between January 1 and March 1. State and local officials and employees who manage public investments, and city and county officials file between January 1 and April 1.

PERIOD COVERED: Disclose all reportable interests held or received during the period from January 1, 1990 through December 31, 1990.

LEAVING OFFICE STATEMENT

File no later than 30 days after leaving office. The period covered is January 1, 19 ____, through the date of leaving office which was:

_____ mo. day yr.

CANDIDATE STATEMENT

File no later than the final filing date for your declaration of candidacy.

Complete Schedules A, B, C-1 and C-2 disclosing investments and interests in real property held on the date of assuming office. In addition, on Schedules D, E, F, G and H-1 through H-3, report income received during the 12 months prior to the date you assumed office.

Complete Schedules A, B, C-1 and C-2 disclosing investments and interests in real property held on the date of assuming office. In addition, on Schedules D, E, F, G and H-1 through H-3, report income received during the 12 months prior to the date you assumed office.

Complete Schedules A, B, C-1 and C-2 disclosing investments and interests in real property held on the date of filing. In addition, on Schedules D, E, F, G and H-1 through H-3, report income received during the 12 months prior to the date you assumed office.

Complete all schedules disclosing investments and interests in real property held and income received at any time during the period covered by the statement.

Complete all schedules disclosing investments and interests in real property held and income received at any time during the period covered by the statement.

Complete Schedules A, B, C-1 and C-2 disclosing investments and interests in real property held on the date of filing.

*INCUMBENT OFFICEHOLDERS WHO ARE RE-ELECTED OR RE-APPOINTED WITHOUT A BREAK IN SERVICE SHOULD NOT COMPLETE AN ASSUMING OFFICE STATEMENT.

NAME _____

The Following Summary Must Be Completed By All Filers

DO NOT COMPLETE THIS SUMMARY PAGE UNTIL YOU HAVE CAREFULLY REVIEWED ALL SCHEDULES AND THE INSTRUCTIONS FOR EACH SCHEDULE.

	SCHEDULE COMPLETED AND ATTACHED	NO REPORTABLE INTERESTS
Schedule A - INVESTMENTS <i>(Which Are <u>Not</u> Held Through A Business Entity Or Trust)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule B - INTERESTS IN REAL PROPERTY <i>(Which Are <u>Not</u> Held Through A Business Entity Or Trust)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule C-1 - INTERESTS IN REAL PROPERTY HELD BY A BUSINESS ENTITY OR TRUST	<input type="checkbox"/>	<input type="checkbox"/>
Schedule C-2 - INVESTMENTS HELD BY A BUSINESS ENTITY OR TRUST	<input type="checkbox"/>	<input type="checkbox"/>
Schedule D - INCOME <i>(Other Than Loans, Gifts And Honoraria)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule E - LOANS <i>(Received Or Outstanding During The Reporting Period)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule F - GIFTS	<input type="checkbox"/>	<input type="checkbox"/>
Schedule G - HONORARIA	<input type="checkbox"/>	<input type="checkbox"/>
Schedule H - COMMISSION INCOME, INCOME AND LOANS TO BUSINESS ENTITIES OR TRUSTS AND INCOME FROM RENTAL PROPERTY	<input type="checkbox"/>	<input type="checkbox"/>

NOTE: AFTER THE SUMMARY PAGE HAS BEEN COMPLETED, PLEASE DISCARD THOSE SCHEDULES ON WHICH YOU HAVE NO REPORTABLE INTERESTS.

VERIFICATION

I have used all reasonable diligence in preparing this statement. I have reviewed the statement and to the best of my knowledge the information contained herein and in the attached schedules is true and complete.

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

Executed on _____, 19____, at _____

(month, day)

(year)

(city and state)

SIGNATURE _____

SEE PAGES 14 & 15 OF THE ATTACHED INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES ON HOW TO COMPLETE SCHEDULE A.

If you need assistance with completing this form, call the Commission's Technical Assistance Division at (916) 322-5662.

NAME _____

**Schedule A -- Investments
(Which Are Not Held By A Business Entity Or Trust)**

(SEE PAGES 14 & 15 OF THE INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES)

NAME OF BUSINESS ENTITY		VALUE
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	<input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: _____ Date Disposed: _____	Ownership Interest <input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*
NAME OF BUSINESS ENTITY		VALUE
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	<input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: _____ Date Disposed: _____	Ownership Interest <input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*
NAME OF BUSINESS ENTITY		VALUE
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year :	<input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: _____ Date Disposed: _____	Ownership Interest <input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*
NAME OF BUSINESS ENTITY		VALUE
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	<input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: _____ Date Disposed: _____	Ownership Interest <input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*

NOTE: YOU MAY BE REQUIRED TO REPORT ON SCHEDULE D ANY SALARY, COMMISSION, DISTRIBUTION OR OTHER INCOME (\$250 OR MORE) RECEIVED BY YOU OR YOUR SPOUSE FROM ANY BUSINESS ENTITY LISTED ON SCHEDULE A.

* If you have checked this box, you must report on Schedules C-1 and C-2 any interests in real property and investments held by the business entity. In addition, if your pro rata share of the gross income from any one source was \$10,000 or more, you may be required to report the name of that source on Schedule H-2.

If additional space is needed, check box and attach an additional Schedule A.

SEE PAGES 16 & 17 OF THE ATTACHED INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES ON HOW TO COMPLETE SCHEDULE B.

If you need assistance with completing this form, call the Commission's Technical Assistance Division at (916) 322-5662.

NAME _____

Schedule B -- Interests In Real Property
(Which Are Not Held By A Business Entity Or Trust)
 (SEE PAGES 16 AND 17 OF THE INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES)

STREET ADDRESS OR PRECISE LOCATION OF PROPERTY		CITY		FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST				
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: _____ Date Disposed: _____	If Rental Property, Ownership Interest Is	<input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*	
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY		CITY		FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST				
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: _____ Date Disposed: _____	If Rental Property, Ownership Interest Is	<input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*	
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY		CITY		FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST				
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: _____ Date Disposed: _____	If Rental Property, Ownership Interest Is	<input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*	
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY		CITY		FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST				
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: _____ Date Disposed: _____	If Rental Property, Ownership Interest Is	<input type="checkbox"/> Less than 10% <input type="checkbox"/> 10% or greater*	

NOTE: You may be required to report on Schedule D Income (\$250 or more) received by you or your spouse from rental property listed on Schedule B.

*If you have a 10% or greater interest in a rental property, you may have additional reporting requirements on Schedule H-3.

If additional space is needed, check box and attach an additional Schedule B.

SEE PAGES 18 & 19 OF THE ATTACHED INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES ON HOW TO COMPLETE SCHEDULE C-1.

If you need assistance with completing this form, call the Commission's Technical Assistance Division at (916) 322-5662.

NAME _____

Schedule C-1 -- Interests In Real Property Held By A Business Entity Or Trust

(SEE PAGES 18 AND 19 OF THE INFORMATION MANUAL
FOR INSTRUCTIONS AND EXAMPLES)

INTERESTS IN REAL PROPERTY HELD BY: _____
(Name Of Business Entity Or Trust Holding The Real Property)*

STREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: _____ Date Acquired: _____ Date Disposed: _____		
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: _____ Date Acquired: _____ Date Disposed: _____		
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: _____ Date Acquired: _____ Date Disposed: _____		
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: _____ Date Acquired: _____ Date Disposed: _____		
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: _____ Date Acquired: _____ Date Disposed: _____		
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: _____ Date Acquired: _____ Date Disposed: _____		
STREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	FAIR <input type="checkbox"/> \$1,000-\$10,000 MARKET <input type="checkbox"/> \$10,001-\$100,000 VALUE <input type="checkbox"/> Over \$100,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: _____ Date Acquired: _____ Date Disposed: _____		

*Your investment in this business entity must be reported on Schedule A-Investments.

If additional space is needed, check box and attach an additional Schedule C-1.

SEE PAGES 18 & 19 OF THE ATTACHED INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES ON HOW TO COMPLETE SCHEDULE C-2.

If you need assistance with completing this form, call the Commission's Technical Assistance Division at (916) 322-5662.

Schedule C-2 -- Investments Held By A Business Entity Or Trust

(SEE PAGES 18 AND 19 OF THE INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES)

INVESTMENTS HELD BY: _____
(Name Of Business Entity Or Trust Holding The Investment(s))*

NAME OF BUSINESS ENTITY		VALUE <input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: _____ Date Disposed: _____	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY		
NAME OF BUSINESS ENTITY		VALUE <input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: _____ Date Disposed: _____	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY		
NAME OF BUSINESS ENTITY		VALUE <input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: _____ Date Disposed: _____	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY		
NAME OF BUSINESS ENTITY		VALUE <input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: _____ Date Disposed: _____	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY		
NAME OF BUSINESS ENTITY		VALUE <input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: _____ Date Disposed: _____	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY		
NAME OF BUSINESS ENTITY		VALUE <input type="checkbox"/> \$1,000-\$10,000 <input type="checkbox"/> \$10,001-\$100,000 <input type="checkbox"/> Over \$100,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: _____ Date Disposed: _____	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY		

*Your investment in this business entity must be reported on Schedule A-Investments.

If additional space is needed, check box and attach an additional Schedule C-2.

SEE PAGES 20 & 21 OF THE ATTACHED INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES ON HOW TO COMPLETE SCHEDULE D.

If you need assistance with completing this form, call the Commission's Technical Assistance Division at (916) 322-5662.

NAME _____

**Schedule D -- Income
(Other Than Loans, Gifts And Honoraria)**

(SEE PAGES 20 AND 21 OF THE INFORMATION MANUAL
FOR INSTRUCTIONS AND EXAMPLES)

GROSS INCOME RECEIVED:

NAME OF THE SOURCE OF INCOME	<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000
ADDRESS	
NATURE OF BUSINESS ACTIVITY, IF ANY	
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
NAME OF THE SOURCE OF INCOME	<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000
ADDRESS	
NATURE OF BUSINESS ACTIVITY, IF ANY	
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
NAME OF THE SOURCE OF INCOME	<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000
ADDRESS	
NATURE OF BUSINESS ACTIVITY, IF ANY	
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
NAME OF THE SOURCE OF INCOME	<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000
ADDRESS	
NATURE OF BUSINESS ACTIVITY, IF ANY	
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	

If additional space is needed, check box and attach an additional Schedule D.

SEE PAGES 21 & 22 OF THE ATTACHED INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES ON HOW TO COMPLETE SCHEDULE E.

If you need assistance with completing this form, call the Commission's Technical Assistance Division at (916) 322-5662.

NAME _____

Schedule E -- Loans
(Received or Outstanding During the Reporting Period)

(SEE PAGES 21 AND 22 OF THE INFORMATION MANUAL
 FOR INSTRUCTIONS AND EXAMPLES)

		AMOUNT OF HIGHEST BALANCE DURING THE REPORTING PERIOD:
NAME OF LENDER		<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000
ADDRESS		
NATURE OF BUSINESS ACTIVITY, IF ANY	WAS THE ENTIRE LOAN REPAID DURING THE REPORTING PERIOD? <input type="checkbox"/> YES <input type="checkbox"/> NO	
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) <input type="checkbox"/> NONE		
NAME OF LENDER		<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000
ADDRESS		
NATURE OF BUSINESS ACTIVITY, IF ANY	WAS THE ENTIRE LOAN REPAID DURING THE REPORTING PERIOD? <input type="checkbox"/> YES <input type="checkbox"/> NO	
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) <input type="checkbox"/> NONE		
NAME OF LENDER		<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000
ADDRESS		
NATURE OF BUSINESS ACTIVITY, IF ANY	WAS THE ENTIRE LOAN REPAID DURING THE REPORTING PERIOD? <input type="checkbox"/> YES <input type="checkbox"/> NO	
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) <input type="checkbox"/> NONE		
NAME OF LENDER		<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000
ADDRESS		
NATURE OF BUSINESS ACTIVITY, IF ANY	WAS THE ENTIRE LOAN REPAID DURING THE REPORTING PERIOD? <input type="checkbox"/> YES <input type="checkbox"/> NO	
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) <input type="checkbox"/> NONE		
NAME OF LENDER		<input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000
ADDRESS		
NATURE OF BUSINESS ACTIVITY, IF ANY	WAS THE ENTIRE LOAN REPAID DURING THE REPORTING PERIOD? <input type="checkbox"/> YES <input type="checkbox"/> NO	
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) <input type="checkbox"/> NONE		

If additional space is needed, check box and attach an additional Schedule E.

SEE PAGES 23 & 24 OF THE ATTACHED INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES ON HOW TO COMPLETE SCHEDULE F.

If you need assistance with completing this form, call the Commission's Technical Assistance Division at (916) 322-5662.

NAME _____

IMPORTANT

Effective January 1, 1991, new prohibitions and limitations will be imposed on gifts and honoraria received by elected state and local officials, state agency officials, members of state boards and commissions, and certain employees of state agencies. These new provisions are discussed at the front of the 1990-91 Information Manual for Form 721 in the section entitled "1991 Legislative Changes."

WARNING: These new prohibitions and limitations do not affect the requirements for disclosing gifts and honoraria received.

Schedule F -- Gifts

(SEE PAGES 23 AND 24 OF THE INFORMATION MANUAL
FOR INSTRUCTIONS AND EXAMPLES)

	DATE(S) RECEIVED:	VALUE(S):	DESCRIPTION OF GIFT(S):
NAME OF DONOR			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF DONOR			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF DONOR			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF DONOR			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF DONOR			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			

If additional space is needed, check box and attach an additional Schedule F.

SEE PAGES 25 AND 26 OF THE ATTACHED INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES ON HOW TO COMPLETE SCHEDULE G.

If you need assistance with completing this form, call the Commission's Technical Assistance Division at (916) 322-5662.

NAME _____

IMPORTANT

Effective January 1, 1991, new prohibitions and limitations will be imposed on gifts and honoraria received by elected state and local officials, state agency officials, members of state boards and commissions, and certain employees of state agencies. These new provisions are discussed at the front of the 1990-91 Information Manual for Form 721 in the section entitled "1991 Legislative Changes."

WARNING: These new prohibitions and limitations do not affect the requirements for disclosing gifts and honoraria received.

Schedule G -- Honoraria

(SEE PAGES 25 AND 26 OF THE INFORMATION MANUAL
FOR INSTRUCTIONS AND EXAMPLES)

	DATE(S):	AMOUNT(S):	DESCRIPTION OF SERVICE(S):
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			

If additional space is needed, check box and attach an additional Schedule G.

SEE PAGES 27, 28 & 29 OF THE ATTACHED INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES ON HOW TO COMPLETE SCHEDULES H-1, H-2 and H-3.

If you need assistance with completing this form, call the Commission's Technical Assistance Division at (916) 322-5662.

NAME _____

Schedule H

(SEE PAGES 27 THROUGH 29 OF THE INFORMATION MANUAL FOR INSTRUCTIONS AND EXAMPLES)

Schedule H-1

Commission Income Received By Brokers, Agents And Salespersons

NAME OF BUSINESS ENTITY	
NAMES OF SOURCES OF INCOME	

Schedule H-2

Income And Loans To A Business Entity Or Trust

NAME OF BUSINESS ENTITY OR TRUST	ADDRESS OF BUSINESS ENTITY OR TRUST
NATURE OF BUSINESS	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY OR TRUST	

Schedule H-3

Income From Rental Property

You must disclose the name(s) of any renter(s) who made rent payments, provided that your pro rata share of such receipts from any one renter was \$10,000 or more.

ADDRESS OF RENTAL PROPERTY	CITY
NAMES OF RENTERS	
ADDRESS OF RENTAL PROPERTY	CITY
NAMES OF RENTERS	

If additional space is needed, check box and attach additional schedules.

