1991-92

STATEMENT OF ECONOMIC INTERESTS

FORM 721 AND INSTRUCTIONS

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

Prepared by the Fair Political Practices Commission P.O. Box 807 Sacramento, CA 95804-0807 PHONE: (916) 322-5662

GIFT LIMITATIONS AND HONORARIA PROHIBITION

Gift Limitations

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

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

State Board and Commission Members, and State Agency Officials and Designated Employees may not accept gifts with a value of more than \$250 in a calendar year from a 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 Gift Limit:

The following are not prohibited or limited by the Political Reform Act:

- -- The items listed in "Exceptions From Disclosure" in the instructions for "Completing Schedule F -- Gifts" of this disclosure form.
- -- Payments, advances, or reimbursements for travel and related lodging and subsistence as described in "Travel Payments." However, many payments for travel, lodging and subsistence must be disclosed.
- -- Wedding gifts. However, wedding gifts must be disclosed.

Gifts From Lobbyists: Elected <u>state</u> officers and certain <u>state</u> board and commission members and <u>state</u> agency officials and employees are prohibited from accepting a gift or gifts, including wedding gifts, aggregating more than \$10 in a month from a lobbyist or lobbying firm registered with the Secretary of State.

"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.

Honoraria Prohibition

<u>Elected State Officers</u> 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.

<u>Local Elected Officers</u> may not accept honoraria for any speech given, article published, or attendance at any public or private conference, convention, meeting, social event, meal, or like gathering, or gifts which aggregate more than \$1,000 from a single source in a calendar year.

Members of State Boards and Commissions, and Employees of State Agencies 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 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. This prohibition does not apply to payments, advances, and reimbursements for travel and related lodging and subsistence, as described in "Travel Payments" below.
- 3. This 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 the General Fund, without being claimed as a deduction from income for tax purposes.

Travel Payments

With the following exceptions, payments and reimbursements for travel are subject to the gift limitations set out above:

Payments, advances, or reimbursements 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, are not prohibited or limited, if either of the following apply:

- (1) The travel is in connection with a speech given by the elected officer or state employee, 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 a nonprofit charitable or religious organization which is exempt from taxation under Section 501(c) (3) of the Internal Revenue Code, or by a person domiciled outside the United States which substantially satisfies the requirements for tax exempt status under Section 501(c) (3) of the Internal Revenue Code.
 - (3) Travel costs paid from campaign funds.
- (4) Travel provided by the agency of an elected officer, member of a state board or commission, or designated employee of a state agency.
- (5) Travel which is reasonably necessary in connection with a bona fide business, trade, or profession and which 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) Travel which is excluded from the definition of a gift by any other provision of the Political Reform Act.

NOTE: Travel payments which are not prohibited or limited may have to be disclosed. Refer to the instructions for completing Schedule D-1 for detailed information.

WHERE MUST STATEMENTS BE FILED?

STATE OFFICERS:

Candidate Statements - File with the registrar of voters/county clerk of the county in which you file your declaration of candidacy.

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

JUDICIAL OFFICERS:

Candidate Statements - File with the registrar of voters/county clerk of the county in which you file your declaration of candidacy.

Judges, Court Commissioners - File with the clerk of your court.

COUNTY OFFICERS:

Candidate Statements - File with the registrar of voters/county clerk of the county in which you file your declaration of candidacy.

County Elected Officer - File with your county clerk.

County Planning Commissioner - File with your county clerk.

CITY OFFICERS:

Candidate Statements - File with the clerk of the city in which you file your declaration of candidacy.

City Elected Officer - File with your city clerk.

City Planning Commissioner - File with your city clerk.

Your filing official will retain a copy and forward the original to FPPC.

Date Received by FPPC

FORM 721

Date Received by Filing Official

STATEMENT OF ECONOMIC INTERESTS

A Public Document

1991/92

PLEASE TYPE OR PRINT IN INK

NAME					TELEPHONE NUMBER
MAILING ADDRESS	STREET	CITY	,	ZIP CODE	
OFFICE HELD OR SO	UGHT (Che	ck One):			
STATE OF CALIFORN	IA OFFICE:				
☐ JUDICIAL BRANCH	COUNTY:			COURT:	
CHECK ONE:] JUDGE	COURT COMMISSIONER			
COUNTY OFFICE:		el .	(COUNTY:	
CITY OFFICE:				CITY:	
TYPE OF STATEMENT (Check the Ap	propriate Box(es)):			
ASSUMING OFFICE	STATEMENT	For Newly-Elected and N	lewly-Ap	pointed Officials O	NLY)*
ELECTED OFFICIA ☐ office in Decemb assuming office.	AL (Other than per or January)	n elected state officers as:). File no later than 30 da	suming ly s after	Date Assumed Offi	ice day yr
APPOINTED OFFICIA	AL				
Not subject to co Commission on J days after assum	udicial Appoi	the State Senate or the ntments. File no later tha	an 10	Date Appointed	
Subject to confir on Judicial Appo appointment or	intments. File	State Senate or the Come no later than 10 days af	mission ter	Date Appointed	mo day yr
assuming office.	In addition, o	and C-2 disclosing investn n Schedules D, D-1, E, F, (e you assumed office.	nents and G and H-1	l interests in real pro I through H-3, repo	pperty held on the date of rt income received during
ANNUAL STATEME					-
State officers and all and employees who	l judges and c manage pub	ourt commissioners file blic investments, and city a	etween J and coun	lanuary 1 and March ty officials file betw	n 1. State and local officials een January 1 and April 1.
PERIOD COVERED: through December	Disclose all re 31, 1991.	portable interests held o	r received	d during the period	from January 1, 1991
Complete all sched during the period c	ules disclosing overed by the	investments and interes statement.	ts in real	property held and i	ncome received at any time
LEAVING OFFICE ST	ATEMENT			Date Left	mo. day yr
File no later than 30 office.	days after lea	aving office. The period o	covered is	s January 1, 19,	, through the date of leaving
Complete all scheduring the period co	ules disclosing overed by the	investments and interest statement.	ts in real p	oroperty held and ir	ncome received at any time
CANDIDATE STATE					
		late for your declaration			
Complete only sche filing.	dules A, B, C-1	and C-2 disclosing invest	tments ar	nd interests in real p	roperty held on the date of

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

A Summary Summ

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DO NOT COMPLETE THIS SUMMARY PAGE UNTIL YOU F REVIEWED ALL SCHEDULES AND THE INSTRUCTIONS FO	HAVE CAREF	ULLY EDULE.
Standard Transit With the tile of the country of th	TEDULE COMPLETED	NO REPORTABLE
Schedule A - INVESTMENTS	AND ATTACHED	INTERESTS
(Which Are <u>Not</u> Held Through A Business Entity Or Trus	t)	
Schedule B - INTERESTS IN REAL PROPERTY		(a) (b)
(Which Are Not Held Through A Business Entity Or Trus	st)	
Schedule C-1 - INTERESTS IN REAL PROPERTY HELD BY A BUSINESS ENTITY OR TRUST		
Schedule C-2 - INVESTMENTS HELD BY A BUSINESS ENTITY OR TRUST		
Schedule D - INCOME (Other Than Loans, Gifts And Honoraria)		Assessed to
Schedule D-1 - INCOME TRAVEL PAYMENTS, ADVANCES, REIMBURSEMENTS	2 d3 45 m (*) = 1	ghwai in T
Schedule E - INCOME LOANS	-	25
(Received Or Outstanding During The Reporting Perio	d) 🗀	
Schedule F - INCOME GIFTS		
Schedule G - INCOME HONORARIA		ndir _
Schedule H-1 - COMMISSION INCOME RECEIVED BY BROKERS, AGE AND SALESPERSONS	NTS	ALCO SERVICE S
Schedule H-2 - INCOME AND LOANS TO BUSINESS ENTITIES OR TRUS	STS	ylaz I
Schedule H-3 - INCOME FROM RENTAL PROPERTY	0 /2	
NOTE: AFTER THE SUMMARY PAGE HAS BEEN COMPLETED, PLEASE DISCARD YOU HAVE NO REPORTABLE INTERESTS.	THOSE SCHEDUL	ES ON WHICH
VERIFICATION	and the	
I have used all reasonable diligence in preparing this statement. I have reviewed my knowledge the information contained herein and in the attached schedules is	the statement and true and complet	d to the best of e.
I certify under penalty of perjury under the laws of the State of California that the	foregoing is true	and correct.
Executed on	(city and st	ate)
SIGNATURE		<u> </u>

NAME_

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 <u>you or your immediate family</u> (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, sells or purchases 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 an office 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 disclose the following investments:

- 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

EXAMPLE, SCHEDULE A

Assume that:

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 partnership in ABC Land Developers must be disclosed.

Schedule A should be completed as follows:

NAME OF BUSINESS ENTITY ABC Land Developers	250 B. WHEN BURNES	VALUE \$1,000-\$10,000 \$10,001-\$100,000
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:	X Over \$100,000 Ownership Interest
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Land Developer	Date Acquired: Date Disposed:	Less than 10% X 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 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.

NAME	

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

d Or Disposed During The Period, You Must Indicate by And Year: uired: osed: d Or Disposed During The Period, You Must Indicate by And Year: uired: uired: osed:	\$10,001-\$100,000 Over \$100,000 Ownership Interest Less than 10% 10% or greater* VALUE \$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000 Ownership Interest	
d Or Disposed During The Period, You Must Indicate by And Year: uired:	VALUE \$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000 Ownership Interest	
d Or Disposed During The Period, You Must Indicate by And Year: uired:	\$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000 Ownership Interest	
Period, You Must Indicate by And Year: uired:	Over \$100,000 Ownership Interest	
uired:	Attended to the second	
	Less than 10% 10% or greater*	
hiroihiroini	VALUE	
ed Or Disposed During The g Period, You Must Indicate ay And Year : quired:	\$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000 Ownership Interest Less than 10% 10% or greater*	
	VALUE	
ed Or Disposed During The g Period, You Must Indicate Day And Year:	\$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000	
quired:posed:	Less than 10% 10% or greater*	
	Period, You Must Indicate ay And Year : uired: posed: ed Or Disposed During The g Period, You Must Indicate bay And Year: uired:	

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 a tency 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.

Interests 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 interests in real property:

- 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.

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.

Schedule R should be completed as follows:

20160016 P 2110010 pe combieren	23 10110443.			
STREET ADDRESS OR PRECISE LOCATION 14738 Spruce Street	OF PROPERTY C	Little Town	FAIR MARKET	\$1,000-\$10,000 \$10,001-\$100,000
NATURE OF INTEREST, E.G., OPTION, OW Ownership	NERSHIP, LEASEHOLD, DEED (OF TRUST	VALUE	Over \$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired:	If Rental Property, Ownership Interest is		an 10% r 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.

NAME	

Schedule B - Interests In Real Property (Which Are Not Held By A Business Entity Or Trust)

(SEE INSTRUCTIONS ON PRECEDING PAGE)

STREET ADDRESS OR PRECISE LOCATION	N OF PROPERTY	CITY		
				FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000
NATURE OF INTEREST, E.G., OPTION, OV	WNERSHIP, LEASEHOLD, D	DEED OF TRUS	T	VALUE Over \$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: Date Disposed:	- 1	If Rental Property, Ownership Interest Is	Less than 10% 10% or greater*
STREET ADDRESS OR PRECISE LOCATION	N OF PROPERTY	CITY	nie 539 o ffz – niede	FAIR \$1,000-\$10,000
NATURE OF INTEREST, E.G., OPTION, OV	WNERSHIP, LEASEHOLD, D	DEED OF TRUS	Т	MARKET \$10,001-\$100,000 VALUE Over \$100,000
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	Less than 10% 10% or greater*
STREET ADDRESS OR PRECISE LOCATIO	N OF PROPERTY	CITY		FAIR \$1,000-\$10,000
NATURE OF INTEREST, E.G., OPTION, O	WNERSHIP, LEASEHOLD,	DEED OF TRU	T T	MARKET \$10,001-\$100,000 VALUE Over\$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: Date Disposed:	es J. Kerds.	If Rental Property, Ownership Interest Is	Less than 10% 10% or greater*
STREET ADDRESS OR PRECISE LOCATIO	l e e e e	CITY DEED OF TRU		FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,00
		Ä.		VALUE Over \$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired:		If Rental Property, Ownership Interest Is	Less than 10% 10% or greater*
NOTE: You may be required to from rental property listed on S *If you have a 10% or greate on Schedule H-3.	chedule B.		1.0	
400				
☐ If addition	al space is needed, c	heck box a	nd attach an additional	Schedule B.

INFORMATION FOR COMPLETING SCHEDULE C-1 - Interests In Real Property 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:

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.

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

Reporting Assets Held By A Trust: You must disclose interests in real property held by any trust in which you have a 10% or greater interest, if your pro rata share of the 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, SCHEDULE C-1

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. The real property
 was not acquired or disposed of during the reporting period.

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

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

STREET ADDRESS OR PRECISE LOCATION OF PRO AP 029 589202	CITY Little Town		\$1,000-\$10,000
NATURE OF INTEREST, E.G., OPTION, OWNERSHI Ownership	P, LEASEHOLD, DEED OF TRUST	FAIR MARKET VALUE	\$10,001-\$100,000 X Over \$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired:		A

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

NAME		

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

INTERESTS IN REAL PROPERTY HELD BY:

TREET ADDRESS OR PRECISE LOCATION OF PROPER	CITY	24X 22421212
REET ADDRESS OR PRECISE LOCATION OF PROPER	CITI	FAIR \$1,000-\$10,000
ATURE OF INTEREST, E.G., OPTION,OWNERSHIP, LE	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE Over \$100,000	
f Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: Date Disposed:	
TREET ADDRESS OR PRECISE LOCATION OF PROPER	RTY	= = = = = = = = = = = = = = = = = = = =
IATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LI	EASEHOLD, DEED OF TRUST	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE Over \$100,000
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 PROPE	RTY	All a Control of
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE Over \$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired:	
STREET ADDRESS OR PRECISE LOCATION OF PROPE	RTY	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE Over \$100,000
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 PROPE	RTY CITY	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, L	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE Over \$100,000	
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: Date Disposed:	9 1790,000 17 17 17

INFORMATION FOR COMPLETING SCHEDULE C-2 - 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 investments:

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 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, SCHEDULE C-2

Assume that:

• ABC Land Developers owns common stock worth \$3,000 in Ajax Building Materials, which does business in your jurisdiction. The investment was not acquired or disposed of during the reporting period.

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

INVESTMENTS HELD BY: ABC Land Developers (Name Of Business Entity Or Trust Holding The Investment(s))*			
NAME OF BUSINESS ENTITY Ajax Building Materials	and a contract of	im the	V
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:	FAIR MARKET VALUE	X \$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Manufactures Building Supplies	Date Acquired: Date Disposed:		

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

NAME	

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

INVESTMENTS HELD BY:	
the house thought	(Name Of Business Entity Or Trust Holding The Investment(s))*
COLUMN TO SALTING	STATE OF THE PARTY

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: S1,000-\$10, Over \$100,0
Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed: NAME OF BUSINESS ENTITY Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed: \$10,001-\$10 Over \$100,0
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Date Acquired: Date Disposed: NAME OF BUSINESS ENTITY Date Acquired: Date Disposed:
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NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: S1,000-\$10,000-\$
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Date Acquired: Date Disposed:
NAME OF BUSINESS ENTITY
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: \$1,000-\$10,0 \$10,001-\$10,0 \$10,001-\$10,0 \$10,001-\$10,0 \$10,001-\$10,0
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Month, Day And Year: Date Acquired: Date Disposed: Over \$100,00
NAME OF BUSINESS ENTITY
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: S1,000-\$10,0 MARKET
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Date Acquired: Date Disposed:
NAME OF BUSINESS ENTITY
nest SECON page of the Second
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: FAIR \$1,000-\$10,000 \$1
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Date Acquired: Date Disposed: Over \$100,00
NAME OF BUSINESS ENTITY
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: \$1,000-\$10,001-\$10
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Date Acquired: Date Disposed: Over \$100,00

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

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 or a parent, subsidiary, or a related business entity:

Manufactures, distributes, sells or purchases 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 Schedule H-1-Commission Income.)

Salary/wages, per diem, reimbursement for expenses. (See exclusions below. Also see Schedule D-1-Income --Travel Payments, Advances, Reimbursements.)

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

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.)

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.

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.

Payments received under a defined benefit pension plan qualified under Internal Revenue Code Section 401(a).

EXAMPLE, SCHEDULE D

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

\$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.

Schedule	D should be completed as follows:	GROSS INCOME RECEIVED:
	E SOURCE OF INCOME Duplex	\$250 - \$1,000
ADDRESS	104 & 106 Main Street, Little Town, CA	X \$1,001 - \$10,000
NATURE OF B	BUSINESS, IF ANY	A 31,001-310,000
	Rental Property	
DESCRIPTION	N OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED Rents	Over \$10,000
NAME OF TH	SOURCE OF INCOME	\$250 - \$1,000
	General Telephone Company	
ADDRESS	567 Main Street, Little Town, CA	T
NATURE OF B	BUSINESS, IF ANY	X \$1,001 - \$10,000
	Manufactures Telephone Equipment	
DESCRIPTION	N OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
	Spouse's Salary	

NAME	

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

	GROSS INCOME RECEIVED:
NAME OF THE SOURCE OF INCOME	2 201,000
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
NAME OF THE SOURCE OF INCOME	
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
NAME OF THE SOURCE OF INCOME	
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
NAME OF THE SOURCE OF INCOME	En and the state of the state o
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000

INFORMATION FOR COMPLETING SCHEDULE D-1 - Income --Travel Payments, Advances, Reimbursements

Schedule D-1 is for disclosing payments, advances, or reimbursements for travel, including actual transportation and related lodging and subsistence. In lieu of disclosing travel payments on Schedule D-1, such payments may be disclosed as gifts on Schedule F, or as income on Schedule D.

Generally, travel payments are "gifts" and must be disclosed if you receive \$50 or more in such payments from a single source.

Travel payments are "income" if you have provided services which were equal to or greater in value than the payments for the travel. Income of \$250 or more received from a single source must be disclosed.

Government Code Section 82028 provides that any person, other than a defendant in a criminal action, who claims that a payment is not a gift by reason of receipt of consideration has the burden of proving that the consideration received is of equal or greater value.

Payment or reimbursement for travel <u>within California</u> in connection with an event at which you gave a speech, participated in a panel or seminar or performed a similar service is not required to be disclosed. However, travel payments in connection with such an event <u>outside</u> California must be disclosed.

Travel payments received from a state, local, or federal government agency, for which you have provided equal or greater consideration, are not required to be disclosed. If you have not provided equal or greater consideration for the payments, you may be required to disclose the payments as gifts.

Travel payments received from a bona fide educational, academic, or charitable organization, for which you have provided equal or greater consideration, are not required to be disclosed. If you have not provided equal or greater consideration for the payments, you may be required to disclose the payments as gifts.

EXAMPLE, SCHEDULE D-1

Assume that you attended a trade show in Mudville, CA.:

• The American Manufacturers Assn. paid \$175 for your travel and accommodations

Schedule D-1 should be completed as follows:	DATE(S): (mo, day & yr)	AMOUNT(S):	PURPOSE AND LOCATION OF TRAVEL:
NAME OF SOURCE American Manufacturers Assn.			1 91
77 Green Lane, Mudville, CA	F.11.F.10.1		transportation and
NATURE OF BUSINESS ACTIVITY, IF ANY Trade Association	5/15/91	\$175	accommodations to attend trade show
TYPE OF PAYMENT: (CHECK ONE)	W ² w ²	oc es TĀ 's	in i Eidh-h

NAME	

Schedule D-1 - Income -- Travel Payments, Advances, Reimbursements (SEE INSTRUCTIONS ON PRECEDING PAGE)

PURPOSE AND LOCATION OF DATE(S): AMOUNT(S): TRAVEL: (mo, day & yr) NAME OF SOURCE **ADDRESS** NATURE OF BUSINESS ACTIVITY, IF ANY TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME NAME OF SOURCE ADDRESS NATURE OF BUSINESS ACTIVITY, IF ANY TYPE OF PAYMENT: (CHECK ONE) INCOME NAME OF SOURCE ADDRESS NATURE OF BUSINESS ACTIVITY, IF ANY TYPE OF PAYMENT: (CHECK ONE) GIFT NAME OF SOURCE **ADDRESS** NATURE OF BUSINESS ACTIVITY, IF ANY GIFT TYPE OF PAYMENT: (CHECK ONE) INCOME NAME OF SOURCE ADDRESS NATURE OF BUSINESS ACTIVITY, IF ANY TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME

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

INFORMATION FOR COMPLETING SCHEDULE E - Income -- 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, sells or purchases 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.

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 <u>principal</u> 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 vacation.

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.

AMOUNT OF HIGHEST RALANCE

Schedule E should be completed as follows:	efont ; e Lit 14	DURING THE REPORTING PERIOD:
NAME OF LENDER Greatest Savings & Loan		\$250 - \$1,000
ADDRESS 123 Main Street, Little Town		\$1,001 - \$10,000
NATURE OF BUSINESS, IF ANY Lending Institution	WAS THE ENTIRE LOAN YES REPAID DURING THE REPORTING PERIOD? X NO	X Over \$10,000
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR Personal Residence	(If Real Property, Provide Address) NONE	INTEREST RATE 14% NONE

	NAME		
	-6. NO4.	위 JP(V)	

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

AMOUNT OF HIGHEST BALANCE DURING THE REPORTING PERIOD: NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN YES Over \$10,000 REPAID DURING THE REPORTING PERIOD? NO SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) INTEREST RATE NONE NONE NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN Over \$10,000 ☐ YES **REPAID DURING** THE REPORTING PERIOD? NO INTEREST RATE SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) NONE NONE NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 WAS THE ENTIRE LOAN NATURE OF BUSINESS ACTIVITY, IF ANY YES Over \$10,000 REPAID DURING THE REPORTING PERIOD? NO SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) INTEREST RATE NONE NONE NAME OF LENDER \$250 - \$1,000 ADDRESS \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN Over \$10,000 YES **REPAID DURING** THE REPORTING PERIOD? NO INTEREST RATE SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) NONE NONE

	If additional space is needed, check box and attach an additional s	Schedule E.
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INFORMATION FOR COMPLETING SCHEDULE F - Income -- Gifts

"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) 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.

See Schedule D-1- Income -- Travel Payments, Advances, Reimbursements for information concerning payments, including advances and reimbursements, for travel.

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

You are <u>not</u> 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.

Schedule F should be completed as follows:	DATE(S) RECEIVED: (mo, day & yr)	VALUE(S):	DESCRIPTION OF GIFT(S):
NAME OF DONOR Valley Pipe Systems			Season tickets to
200 E. Fifth, Hometown	March 1, 1991	\$200	Hometown A's
NATURE OF BUSINESS, IF ANY Manufactures Irrigation & Plumbing Supplies			

NAME	

Schedule F - Income -- Gifts

(SEE INSTRUCTIONS ON PRECEDING PAGE)

	DATE(S) RECEIVED: (mo, day & yr)	VALUE(S):	DESCRIPTION OF GIFT(S):
NAME OF SOURCE	ACC 2 00 T	34 i*	nas de la
ADDRESS	2000	9 - N 1	with the same
NATURE OF BUSINESS ACTIVITY, IF ANY	er er	e e e e e e e e e e e e e e e e e e e	of the second
NAME OF SOURCE	11/2	a tel anti	p - Topos - T
ADDRESS	11. (1.51) 12. (1.51)	5 X .**	F A 4 - 2
NATURE OF BUSINESS ACTIVITY, IF ANY	20.0		
NAME OF SOURCE		co cosp may cope	
ADDRESS			N. Y
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF SOURCE			
ADDRESS	179		
NATURE OF BUSINESS ACTIVITY, IF ANY			3
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			

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

INFORMATION FOR COMPLETING SCHEDULE G - Income -- Honoraria

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

<u>Payment or reimbursement for travel in connection with an event</u>: 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 on Schedule D-1 - Income -- Travel Payments, Advances, Reimbursements if the travel was <u>outside</u> California. Payment or reimbursement for travel in connection with such an event <u>within</u> California is <u>not</u> 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.

You are not required to disclose 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 Golden, California. The Association pays you:

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

You are provided dinner at the event before your speech.

You are <u>not</u> required to disclose:

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

DATE(S): (mo, day & yr)	VALUE(S):	DESCRIPTION OF SERVICES:
1/15/91	\$300	speaker at annual convention
	(mo, day & yr)	(mo, day & yr) VALUE(S):

NAME			

Schedule G - Income -- Honoraria

(SEE INSTRUCTIONS ON PRECEDING PAGE)

	DATE(S): (mo, day & yr)	AMOUNT(S):	DESCRIPTION OF SERVICES:
IAME OF SOURCE		70 In 100	The first
ADDRESS		1 II = g = gF	
NATURE OF BUSINESS ACTIVITY, IF ANY	19	ANGER Server - v-	
NAME OF SOURCE	1 2 2		
ADDRESS	TWEE X		
NATURE OF BUSINESS ACTIVITY, IF ANY			4 1-5
NAME OF SOURCE		San Pyn	
ADDRESS		TO DESCRIPTION OF THE PARTY OF	
NATURE OF BUSINESS ACTIVITY, IF ANY	growing of	rouso AK	
NAME OF SOURCE			
ADDRESS TO THE PROPERTY OF THE	A = 1	Marie Commission	- diff
NATURE OF BUSINESS ACTIVITY, IF ANY			24-2-1
NAME OF SOURCE	4	(B) (B) (B) (B) (B)	we want l
ADDRESS		Thi Open	
NATURE OF BUSINESS ACTIVITY, IF ANY		Manager 1	marina 1 *

If additional space is needed, check box and attach an additional Schedule
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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 also 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 also be reported on Schedule B. Your pro rata share of the gross rental income from the property must also be reported on Schedule D.

FPPC Regulation 18740 provides a 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 spouse's law firm and its client because your pro rata share (50%) of the \$20,000 paid to the law firm is \$10,000 and meets the reporting threshold.

Schedule H-2 would be completed as follows:

NAME OF BUSINESS ENTITY OR TRUST

ABC Land Developers

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

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	CITY
14738 Spruce Street	Little Town
NAMES OF RENTERS	
Sylvan Taylor, M.D.	and Artist the recommendation of the contract
	and the second s

NAME			

Schedule H

(SEE INSTRUCTIONS ON PRECEDING PAGES)

Schedule H-1

Commission Income Received By B	rokers, Agents And Salespersons
NAME OF BUSINESS ENTITY	
NAMES OF SOURCES OF INCOME	
	ule H-2 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	
Schedu	
Income From Ro	ental Property
You must disclose the name(s) of any renter(s) who made rer receipts from any one renter was \$10,000 or more.	nt payments, provided that your pro rata share of such
ADDRESS OF RENTAL PROPERTY	CITY
NAMES OF RENTERS	
	CITY
ADDRESS OF RENTAL PROPERTY	
NAMES OF RENTERS	

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

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STATEMENT OF ECONOMIC INTERESTS FOR DESIGNATED EMPLOYEES

FORM 730 AND INSTRUCTIONS

IF YOU ARE AN OFFICIAL OR EMPLOYEE WHOSE POSITION IS DESIGNATED IN A CONFLICT OF INTEREST CODE, USE THE FORM 730 TO FILE:









CANDIDATE STATEMENT

Prepared by the Fair Political Practices Commission P.O. Box 807 Sacramento, CA 95804-0807 Phone: (916) 322-5662

GIFT LIMITATIONS AND HONORARIA PROHIBITION

Gift Limitations

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

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

State Board and Commission Members, and State Agency Officials and Designated Employees may not accept gifts with a value of more than \$250 in a calendar year from a 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 Gift Limit:

The following are not prohibited or limited by the Political Reform Act:

- -- The items listed in "Exceptions From Disclosure" in the instructions for "Completing Schedule F -- Gifts" of this disclosure form.
- -- Payments, advances, or reimbursements for travel and related lodging and subsistence as described in "Travel Payments." However, many payments for travel, lodging and subsistence must be disclosed.
- -- Wedding gifts. However, wedding gifts must be disclosed.

Gifts From Lobbyists: Elected <u>state</u> officers and certain <u>state</u> board and commission members and <u>state</u> agency officials and employees are prohibited from accepting a gift or gifts, including wedding gifts, aggregating more than \$10 in a month from a lobbyist or lobbying firm registered with the Secretary of State.

"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.

Honoraria Prohibition

<u>Elected State Officers</u> 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.

<u>Local Elected Officers</u> may not accept honoraria for any speech given, article published, or attendance at any public or private conference, convention, meeting, social event, meal, or like gathering, or gifts which aggregate more than \$1,000 from a single source in a calendar year.

Members of State Boards and Commissions, and Employees of State Agencies 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 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. This prohibition does not apply to payments, advances, and reimbursements for travel and related lodging and subsistence, as described in "Travel Payments" below.
- 3. This 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 the General Fund, without being claimed as a deduction from income for tax purposes.

Travel Payments

With the following exceptions, payments and reimbursements for travel are subject to the gift limitations set out above:

Payments, advances, or reimbursements 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, are not prohibited or limited, if either of the following apply:

- (1) The travel is in connection with a speech given by the elected officer or state employee, 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 a nonprofit charitable or religious organization which is exempt from taxation under Section 501(c) (3) of the Internal Revenue Code, or by a person domiciled outside the United States which substantially satisfies the requirements for tax exempt status under Section 501(c) (3) of the Internal Revenue Code.
 - (3) Travel costs paid from campaign funds.
- (4) Travel provided by the agency of an elected officer, member of a state board or commission, or designated employee of a state agency.
- (5) Travel which is reasonably necessary in connection with a bona fide business, trade, or profession and which 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) Travel which is excluded from the definition of a gift by any other provision of the Political Reform Act.

NOTE: Travel payments which are not prohibited or limited may have to be disclosed. Refer to the instructions for completing Schedule D-1 for detailed information.

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:

File if you assume a position designated in your agency's conflict of interest code.

- a. Positions subject to State Senate confirmation -- File no later than 30 days after your appointment or nomination by the Governor.
- b. All other positions -- File no later than 30 days after you assume office.

Annual Statement:

File at the time prescribed in your agency's conflict of interest code (April 1 for most filers).

Leaving Office Statement:

File no later than 30 days after you leave your designated position.

Initial Statement:

If your agency has a <u>newly-adopted</u> conflict of interest code, file no later than **30 days** after the effective date of your agency's conflict of interest code. If your position was <u>newly</u> designated in your agency's conflict of interest code, file no later than **30 days** after the effective date of the amendment to the code.

Candidate Statement:

File no later than the final filing deadline for your declaration of candidacy. (Candidates for elective offices not specified in Gov. Code Section 87200 must file a "candidate" statement (Form 730) only if required by the agency's conflict of interest code.)

WHERE MUST STATEMENTS BE FILED?

All statements, except those filed by State Assembly staff members, are filed with your own agency, board or commission unless otherwise specified in your agency's conflict of interest code.

State Assembly staff members file their statements directly with the Fair Political Practices Commission.

You must file an originally signed statement of economic interests with each agency, board or commission with which you hold a designated position covered by a conflict of interest code.

CONFLICT OF INTEREST CODE DISCLOSURE CATEGORIES

Before completing this form, contact your agency, board or commission to receive a copy of your disclosure category, which outlines the type of information you must disclose.

FORM 730

Statement of Economic Interests For Designated Employees

A PUBLIC DOCUMENT 1991/92

(Type or Print in Ink)

Date Received by Filing Official

NAME OF FILER NAME OF AGENCY **POSITION TITLE MAILING ADDRESS** DAYTIME TELEPHONE NUMBER CHECK THE APPROPRIATE BOX(ES): **ASSUMING OFFICE STATEMENT:** Date Positions subject to State Senate confirmation -- File no later than 30 days after your appointment. Date All other positions -- File no later than 30 days after you assume office. You must disclose on Schedules A, B, C-1, C-2, and G all reportable investments, interests in real property and business positions required by your disclosure category, held on the date you assumed your position. In addition, you must disclose on Schedules D, D-1, E, F, H-1, H-2 and H-3 income from all reportable sources received during the 12 months prior to the date you assumed office. ANNUAL STATEMENT: (Required to be filed for each year that you hold your designated position.) You are required to file a statement no later than disclosing all reportable investments, interests in real property and business positions held and income received during the period from January 1, 1991 through December 31, 1991. **LEAVING OFFICE STATEMENT:** (Required to be filed when you leave your designated position.) You are leaving or have left your position on and must file a statement no later than 30 days after that date. You must disclose all reportable investments, interests in real property and business positions held and income received during the period from January 1, 1991 through the date you left your designated position. INITIAL STATEMENT: (Check the box below ONLY if your position has been recently designated or if you are filing under a <u>new</u> Conflict of Interest Code for your agency.) The conflict of interest code for your agency became effective or your position was newly designated on You must file a statement no later than 30 days after this date. You must disclose on Schedules A, B, C-1, C-2 and G all reportable investments, interests in real property, and business positions held on the date your agency's code or your designation became effective. In addition, you must disclose on Schedules D, D-1, E, F, and H-1, H-2 and H-3 income from all reportable sources received during the 12 months prior to the date your agency's code or your designation became effective. CANDIDATE STATEMENT: (If required by the conflict of interest code of the jurisdiction in which you are seeking elective office.) $oldsymbol{ol{ol}oldsymbol{ol{oldsymbol{oldsymbol{oldsymbol{oldsymbol{ol}}}}}}}}}}}}}}}}}}$ Schedules A, B, C-1, C-2 and G.

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THE FOLLOWING SUMMARY MUST BE COMPLETED BY ALL FILERS

(Do not complete this summary until you have carefully reviewed the instructions for each schedule)

SCHEDULE A INVESTMENTS (Which Are Not Held By A Bu	usiness Entity Or Trust)
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE B INTERESTS IN REAL PROPERTY (Which Or Tr	
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE C-1 INTERESTS IN REAL PROPERTY HELI OR TRUST	D BY A BUSINESS ENTITY
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE C-2 INVESTMENTS HELD BY A BUSINESS EN	TITY OR TRUST
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE D INCOME (Other Than Loans And Gifts)	
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE D-1 INCOME - TRAVEL PAYMENTS, ADVANG	CES, REIMBURSEMENTS
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE E INCOME - LOANS (Received Or Outstanding)	During The Reporting Period)
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE F INCOME - GIFTS	greetsdy variety
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE G BUSINESS POSITIONS	
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE H-1 COMMISSION INCOME RECEIVED BY BROAND SALESPERSONS	OKERS, AGENTS
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE H-2INCOME AND LOANS TO BUSINESS ENT	ITIES OR TRUSTS
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
SCHEDULE H-3 INCOME FROM RENTAL PROPERTY	1 2
. COMPLETED AND ATTACHED NO REPORTABLE INTERESTS	SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY
VERIFICATION	
I have used all reasonable diligence in preparing this statement. I have used all reasonable diligence in preparing this statement. I have used all reasonable diligence in preparing this statement. I have used all reasonable diligence in preparing this statement. I have used all reasonable diligence in preparing this statement. I have used all reasonable diligence in preparing this statement. I have used all reasonable diligence in preparing this statement. I have used all reasonable diligence in preparing this statement.	nave reviewed the statement and to the n the attached schedules is true and
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	City and State)
SIGNATURE	

INFORMATION FOR COMPLETING SCHEDULE A - Investments

(Which Are Not Held By A Business Entity Or Trust)

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INVESTMENTS YOU MUST DISCLOSE.

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, sells or purchases 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 an office 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 <u>not</u> required to disclose the following investments:

- 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

EXAMPLE, SCHEDULE A

Assume that:

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 partnership in ABC Land Developers must be disclosed.

Schedule A should be completed as follows:

NAME OF BUSINESS ENTITY		VALUE
ABC Land Developers		\$1,000-\$10,000
NATURE OF INVESTMENT, E.G. COMMON STOCK, PARTNERSHIP INTEREST	If Acquired Or Disposed During The	\$10,001-\$100,000 X Over \$100,000
Partnership	Reporting Period, You Must Indicate Month, Day And Year:	Ownership Interest
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired:	
Land Developer	Date Disposed:	Less than 10% X 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 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.

NAME				
	_	 _		

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

NAME OF BUSINESS ENTITY		VALUE \$1,000-\$10,000
NATURE OF INVESTMENT, e.g., COMMON STOCK, PARTNERSHIP INTEREST GENERAL DESCRIPTION OF BUSINESS ACTIVITY	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed:	\$10,001-\$100,000 Over \$100,000
NAME OF BUSINESS ENTITY		VALUE
NATURE OF INVESTMENT, e.g., COMMON STOCK, PARTNERSHIP INTEREST GENERAL DESCRIPTION OF BUSINESS ACTIVITY	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed:	\$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000 Ownership Interest Less than 10% 10% or greater*
NAME OF BU NOTE - if they and INTURE OF I Funds in an IN	an direct	VALUE \$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000
GENERAL DE REPORTASCO - then to itamize the IRT	they have	Less than 10% 10% or greater*
NATURE OF		\$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000
GENERAL DE	שate טוsposed:	Less than 10% 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 additional space is needed, check box and attach an additional Schedu
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^{*}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.

INFORMATION FOR COMPLETING SCHEDULE B - Interests In Real Property

(Which Are Not Held By A Business Entity Or Trust)

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INTERESTS YOU MUST DISCLOSE.

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.

Interests 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 interests in real property:

- 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.

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.

Schedule B should be completed as follows:

STREET ADDRESS OR PRECISE LOCATIO 14738 Spruce Street	N OF PROPERTY	CITY Little Town	FAIR	\$1,000-\$10,000
NATURE OF INTEREST, E.G., OPTION, O' Ownership	WNERSHIP, LEASEHOLD,	DEED OF TRUST	MARKET VALUE	\$10,001-\$100,000 Over \$100,000
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	=	an 10% 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.

NAME	123	

Schedule B - Interests In Real Property (Which Are Not Held By A Business Entity Or Trust)

(SEE INSTRUCTIONS ON PRECEDING PAGE)

STREET ADDRESS OR PRECISE LOCATION OF PRO	PERTY	CITY	- (-02)	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST			FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE Over\$100,000	
	(ii) 3 - 1 -	Sn - (S1 - 1 - 1)	VALUE OVER \$ 1,00,000	
	cquired:sposed:		Less than 10% 10% or greater*	
STREET ADDRESS OR PRECISE LOCATION OF PROP	PERTY	CITY	rt eta seavat nga - n	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP	P, LEASEHOLD, DEED (DF TRUST	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE Over \$100,000	
Reporting Period Tod Widst Indicate	cquired:	If Rental Property, Ownership Interest Is	Less than 10% 10% or greater*	
STREET ADDRESS OR PRECISE LOCATION OF PROF	PERTY	CITY		
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP	P, LEASEHOLD, DEED (OF TRUST	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE Over \$100,000	
Reporting renod rou wast indicate	cquired:	If Rental Property, Ownership Interest Is	Less than 10% 10% or greater*	
STREET ADDRESS OR PRECISE LOCATION OF PROF	ERTY	CITY	21 (11 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP	, LEASEHOLD, DEED C	OF TRUST .	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE Over \$100,000	
	cquired:isposed:		Less than 10% 10% or greater*	
NOTE: You may be required to report or from rental property listed on Schedule	Schedule D any i			
If you have a 10% or greater interest on Schedule H-3.	t in a rental prop	perty, you may have addition	onal reporting requirements	
			• 155	
☐ If additional space i	s needed, check b	ox and attach an additional !	Schedule R	
		on and account on additional .	octicatie b.	

INFORMATION FOR COMPLETING SCHEDULE C-1 - Interests In Real Property Held By Business Entities Or Trusts

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPE OF INTERESTS YOU MUST DISCLOSE.

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:

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.

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

Reporting Assets Held By A Trust: You must disclose interests in real property held by any trust in which you have a 10% or greater interest, if your pro rata share of the 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, SCHEDULE C-1

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. The real property was not acquired or disposed of during the reporting period.

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

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 PRO AP 029 589202	PERTY	Little Town		
NATURE OF INTEREST, E.G., OPTION, OWNERSHI Ownership	P, LEASEHOLD, DEED OF T	RUST •	FAIR MARKET	\$1,000-\$10,000 \$10,001-\$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: Date Disposed:		VALUE	X Over \$100,000

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

NAME		

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

INTERESTS IN REAL PROPERTY HEL	LD BY:	
		ty Or Trust Holding The Real Property)*
TREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	
ATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEAS	SEHOLD, DEED OF TRUST	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE \$10,001-\$100,000
Acquired Or Disposed During The eporting Period You Must Indicate fonth, Day And Year:	Date Acquired: Date Disposed:	Over\$100,000
REET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	
ATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEAS	SEHOLD, DEED OF TRUST	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE
f Acquired Or Disposed During The Reporting Period 'You Must Indicate Month, Day And Year:	Date Acquired: Date Disposed:	Over \$100,000
REET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST		FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000
Acquired Or Disposed During The eporting Period You Must Indicate Month, Day And Year:	Date Acquired:	Over \$100,000
REET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	
ATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEAS	SEHOLD, DEED OF TRUST	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE
f Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: Date Disposed:	Over \$100,000
REET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY	
ATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEAS	SEHOLD, DEED OF TRUST	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000 VALUE
Acquired Or Disposed During The leporting Period You Must Indicate Month, Day And Year:	Date Acquired:	L Over \$100,000

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

INFORMATION FOR COMPLETING SCHEDULE C-2 - Investments Held By Business Entities Or Trusts

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES INTERESTS YOU MUST DISCLOSE.

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 investments:

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 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, SCHEDULE C-2

Assume that:

 ABC Land Developers owns common stock worth \$3,000 in Ajax Building Materials, which does business in your jurisdiction. The investment was not acquired or disposed of during the reporting period.

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

INVESTMENTS HELD BY: ABC (Name Of	e Investm	ent(s))*	
NAME OF BUSINESS ENTITY Ajax Building Materials			
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP Common Stock GENERAL DESCRIPTION OF BUSINESS ACTIVITY	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: Date Acquired:	FAIR MARKET VALUE	X \$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000
Manufactures Building Supplies	Date Disposed:		ŧ

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

Schedule C-2 - Investments Held By A Business Entity Or Trust (SEE INSTRUCTIONS ON PRECEDING PAGE)

INVESTMENTS HELD BY: _	av a magadamuli magami labigi wa da
	(Name Of Business Entity Or Trust Holding The Investment(s))*

NAME OF BUSINESS ENTITY			-
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	FAIR MARKET VALUE	310,001-3100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: Date Disposed:		Over \$100,000
NAME OF BUSINESS ENTITY	reduced. Establishment great		
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	FAIR MARKET VALUE	\$1,000-\$10,000 \$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: Date Disposed:	VALUE	Over \$100,000
NAME OF BUSINESS ENTITY			
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	FAIR MARKET	\$1,000-\$10,000 \$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: Date Disposed:	VALUE	Over \$100,000
NAME OF BUSINESS ENTITY			
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	FAIR MARKET	\$1,000-\$10,000 \$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired:	VALUE	Over \$100,000
NAME OF BUSINESS ENTITY			1 10000000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	FAIR MARKET	\$1,000-\$10,000 \$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY •	Date Acquired:	VALUE	Over \$100,000
NAME OF BUSINESS ENTITY			
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	FAIR MARKET	\$1,000-\$10,000 \$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Disposed:	VALUE	Over \$100,000
*Your investment in this business entity must be repor	ted on Schedule A-Investments.		

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

(2/92)

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

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

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 or a parent, subsidiary, or a related business entity:

Manufactures, distributes, sells or purchases 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 Schedule H-1-Commission Income.)

Salary/wages, per diem, reimbursement for expenses. (See exclusions below. Also see Schedule D-1-Income — Travel Payments, Advances, Reimbursements.)
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.)

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.

Payments received under a defined benefit pension plan qualified under Internal Revenue Code Section

EXAMPLE, SCHEDULE D

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

\$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.

Schedule D should be completed as follows: GROS	S INCOME RECEIVED:
NAME OF THE SOURCE OF INCOME	
ADDRESS 104 & 106 Main Street, Little Town, CA NATURE OF BUSINESS, IF ANY Rental Property DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED Rents	\$250 - \$1,000 X \$1,001 - \$10,000 Over \$10,000
NAME OF THE SOURCE OF INCOME General Telephone Company	\$250 - \$1,000
ADDRESS • 567 Main Street, Little Town, CA	\$250-\$1,000
NATURE OF BUSINESS, IF ANY	X \$1,001 - \$10,000
Manufactures Telephone Equipment	
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
Spouse's Salary	

NAME	

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

	GROSS INCOME RECEIVED:
NAME OF THE SOURCE OF INCOME	
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over\$10,000
NAME OF THE SOURCE OF INCOME	
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
NAME OF THE SOURCE OF INCOME	
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
NAME OF THE SOURCE OF INCOME	
ADDRESS	
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000 °

space is needed, check box and attach an additional Schedule D.
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INFORMATION FOR COMPLETING SCHEDULE D-1 - Income --Travel Payments, Advances, Reimbursements

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

Schedule D-1 is for disclosing payments, advances, or reimbursements for travel, including actual transportation and related lodging and subsistence. In lieu of disclosing travel payments on Schedule D-1, such payments may be disclosed as gifts on Schedule F, or as income on Schedule D.

Generally, travel payments are "gifts" and must be disclosed if you receive \$50 or more in such payments from a single source.

Travel payments are "income" if you have provided services which were equal to or greater in value than the payments for the travel. Income of \$250 or more received from a single source must be disclosed.

Government Code Section 82028 provides that any person, other than a defendant in a criminal action, who claims that a payment is not a gift by reason of receipt of consideration has the burden of proving that the consideration received is of equal or greater value.

Payment or reimbursement for travel <u>within California</u> in connection with an event at which you gave a speech, participated in a panel or seminar or performed a similar service is not required to be disclosed. However, travel payments in connection with such an event <u>outside</u> California must be disclosed.

Travel payments received from a state, local, or federal government agency, for which you have provided equal or greater consideration, are not required to be disclosed. If you have not provided equal or greater consideration for the payments, you may be required to disclose the payments as gifts.

Travel payments received from a bona fide educational, academic, or charitable organization, for which you have provided equal or greater consideration, are not required to be disclosed. If you have not provided equal or greater consideration for the payments, you may be required to disclose the payments as gifts.

EXAMPLE, SCHEDULE D-1

Assume that you attended a trade show in Mudville, CA.:

• The American Manufacturers Assn. paid \$175 for your travel and accommodations

Schedule D-1 should be completed as follows:	DATE(S): (mo, day & yr)	AMOUNT(S):	LOCATION OF TRAVEL:
NAME OF SOURCE			
American Manufacturers Assn.			
77 Green Lane, Mudville, CA	5/15/91	\$175	transportation and accommodations to attend trade show
NATURE OF BUSINESS ACTIVITY, IF ANY			
Trade Association			
TYPE OF PAYMENT: (CHECK ONE)			

NAME

Schedule D-1 - Income -- Travel Payments, Advances, Reimbursements (SEE INSTRUCTIONS ON PRECEDING PAGE)

	DATE(S): (mo, day & yr)	AMOUNT(S):	PURPOSE AND LOCATION OF
NAME OF SOURCE	(ino, day a yi)		TRAVEL.
ADDRESS	- Th		4
NATURE OF BUSINESS ACTIVITY, IF ANY			
TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME			
NAME OF SOURCE		STOPE IN ILE	une de la companya de
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY	Letter medical	runis vil i	
TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME	===	Section 1	
NAME OF SOURCE	VIII - 12	1179 136.3	
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY		31-331	
TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME			
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
TYPE OF PAYMENT: (CHECK ONE) GIFT " INCOME			
NAME OF SOURCE			
ADDRESS	= 1	B	
NATURE OF BUSINESS ACTIVITY, IF ANY		•	3.
TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME			
If additional space is needed, check box ar	nd attach an a	dditional Sched	lule D-1 .

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

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

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, sells or purchases 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.

You are <u>not</u> 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 <u>principal</u> 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 vacation.

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.

Schedule E should be completed as follows:		AMOUNT OF HIGHEST BALANCE DURING THE REPORTING PERIOD:
NAME OF LENDER		
Greatest Savings & Loan		\$250 - \$1,000
ADDRESS		\$230 \$1,000
123 Main Street, Little Town		\$1,001 - \$10,000
NATURE OF BUSINESS, IF ANY	WAS THE ENTIRE LOAN YES	[V] 0 40000
Lending Institution	REPAID DURING THE REPORTING PERIOD? X NO	X Over\$10,000
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR	(If Real Property, Provide Address)	INTEREST RATE
Personal Residence	NONE	14% NONE

NAME	

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

AMOUNT OF HIGHEST BALANCE DURING THE REPORTING PERIOD: NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 WAS THE ENTIRE LOAN NATURE OF BUSINESS ACTIVITY, IF ANY ___ YES Over \$10,000 REPAID DURING THE REPORTING PERIOD? NO SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) INTEREST RATE NONE NONE NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN YES Over \$10,000 **REPAID DURING** THE REPORTING PERIOD? NO SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) INTEREST RATE NONE NONE NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN YES Over \$10,000 **REPAID DURING** THE REPORTING PERIOD? NO SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) **INTEREST RATE** NONE NONE NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN ☐ YES Over \$10,000 **REPAID DURING** NO THE REPORTING PERIOD? SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) INTEREST RATE NONE NONE

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

INFORMATION FOR COMPLETING SCHEDULE F - Income -- Gifts

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

"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) 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.

See Schedule D-1- Income -- Travel Payments, Advances, Reimbursements for information concerning payments, including advances and reimbursements, for travel.

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.

You are <u>not</u> 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.

Schedule F should be completed as follows:	DATE(S) RECEIVED: (mo, day & yr)	VALUE(S):	DESCRIPTION OF GIFT(S):	
Valley Pipe Systems	= =			
ADDRESS			Season tickets to	
200 E. Fifth, Hometown	March 1, 1991	\$200	Hometown A's	
NATURE OF BUSINESS, IF ANY	<i>\$</i>		baseball team	l
Manufactures Irrigation & Plumbing Supplies				

NAME		

Schedule F - Income -- Gifts

(SEE INSTRUCTIONS ON PRECEDING PAGE)

s∃s vae ° ¹	DATE(S) RECEIVED: (mo, day & yr)	VALUE(S):	DESCRIPTION OF GIFT(S):
NAME OF SOURCE			
ADDRESS	- 26		=
NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			j
NAME OF SOURCE			
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NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF SOURCE			
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NATURE OF BUSINESS ACTIVITY, IF ANY			
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			

Information for SCHEDULE G: Business Positions

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF POSITIONS YOU MUST DISCLOSE.

- You must report the name of any business entity covered by your disclosure category for which you are a director, officer, partner, trustee, employee, or hold any position of management.
- Positions held in non-profit or charitable organizations or campaign committees are not reportable.

EXAMPLE, SCHEDULE G

Assume that:

 Your disclosure category requires you to disclose business positions in entities which are contractors, land developers, or manufacturers of equipment used by your agency. You have been a partner in ABC Land Developers during the entire reporting period. You would report that position as follows:

Schedule G should be completed as follows:

NAME OF BUSINESS ENTITY ABC Land Developers		ADDRESS OF ENTITY 5744 Tenth Street, Little Town
NATURE OF BUSINESS ACTIVITY, IF ANY Land Developer		YOUR JOB TITLE OR POSITION Partner
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? X YES NO	IF NO PLEASE IN	POSITION COMMENCED ON DICATE: POSITION TERMINATED ON

NAME	

Schedule G -- Business Positions (SEE INSTRUCTIONS ON PRECEDING PAGE)

NAME OF ENTITY	LADDI	DECC OF CUTITY
and the second of the second of the	ADDI	RESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOU	R JOB TITLE OR POSITION
DESCRIPTION OF BOSINESS ACTIVITY	1001	K JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING REPORT		
POSITION HELD THROUGH ENTIRE REPORTING PERIOD?	IF NO	POSITION COMMENCED ON
☐ YES ☐ NO	PLEASE INDICAT	TE: POSITION TERMINATED ON
NAME OF ENTITY	LADDE	DECE OF FAMILY
TRANSCO CRITICI	AUUF	RESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR	R JOB TITLE OR POSITION
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	FNO	POSITION COMMENCED ON
L YES L NO P	LEASE INDICAT	E: POSITION TERMINATED ON
NAME OF ENTITY	ADDE	RESS OF ENTITY
		CONTRACTOR OF THE PROPERTY OF
DESCRIPTION OF BUSINESS ACTIVITY	YOUR	I JOB TITLE OR POSITION
	a - 15, = 1	JP90 I
POSITION HELD THROUGH ENTIRE REPORTING PERIOD?		
**	NO	POSITION COMMENCED ON
YES NO P	LEASE INDICATI	E: POSITION TERMINATED ON
NAME OF ENTITY	ADDI	RESS OF ENTITY
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NAME OF ENTITY DESCRIPTION OF BUSINESS ACTIVITY	1 1/4/1/	RESS OF ENTITY R JOB TITLE OR POSITION
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DESCRIPTION OF BUSINESS ACTIVITY POSITION HELD THROUGH ENTIRE REPORTING PERIOD?	YOU	R JOB TITLE OR POSITION
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☐ If additional space is needed, check box and attach an additional Schedule G.

INFORMATION FOR COMPLETING SCHEDULE H-1-- Commission Income

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

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 BOSINESS 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

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

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 also 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 also be reported on Schedule B. Your pro rata share of the gross rental income from the property must also be reported on Schedule D.

FPPC Regulation 18740 provides a 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 spouse's law firm and its client because your pro rata share (50%) of the \$20,000 paid to the law firm is \$10,000 and meets the reporting threshold.

Schedule H-2 would be completed as follows:

NAME OF BUSINESS ENTITY OR TRUST	ADDRESS OF BUSINESS ENTITY OR TRUST
ABC Land Developers	5744 Tenth Street, Little Town
NATURE OF BUSINESS, IF ANY	
Land Developers	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUS	SINESS ENTITY OR TRUST
Little Town Bank	
NAME OF BUSINESS ENTITY OR TRUST	ADDRESS OF BUSINESS ENTITY OR TRUST
Could and town	4004 11 1 01 1 111 =
Smith and Jones	1261 High Street, Little Town
NATURE OF BUSINESS, IF ANY	1261 High Street, Little Town
	1261 High Street, Little Town
NATURE OF BUSINESS, IF ANY	

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	CITY
14738 Spruce Street	Little Town
NAMES OF RENTERS	- 1 1 10
Sylvan Taylor, M.D.	

NAME		

Schedule H

(SEE INSTRUCTIONS ON PRECEDING PAGES)

Schedule H-1

NAME OF BUSINESS ENTITY	
NAMES OF SOURCES OF INCOME	
•	
	Schedule H-2
Income And	Loans To A Business Entity Or Trust
AME OF BUSINESS ENTITY OR TRUST	ADDRESS OF BUSINESS ENTITY OR TRUST
ATURE OF BUSINESS	
AMES OF SOURCES OF INCOME AND LOANS TO THE BURTHUST	JSINESS ENTITY
	Schedule H-3
Inco	me From Rental Property
ou must disclose the name(s) of any renter(s) ceipts from any one renter was \$10,000 or m) who made rent payments, provided that your pro rata share of such nore.
DDRESS OF RENTAL PROPERTY	CITY
AMES OF RENTERS	
DRESS OF RENTAL PROPERTY	CITY
MES OF RENTERS	
	I

1991-92

STATEMENT OF ECONOMIC INTERESTS

FORM 721 AND INSTRUCTIONS

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

Prepared by the Fair Political Practices Commission P.O. Box 807 Sacramento, CA 95804-0807 PHONE: (916) 322-5662

GIFT LIMITATIONS AND HONORARIA PROHIBITION

Gift Limitations

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

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

<u>State Board and Commission Members, and State Agency Officials and Designated Employees</u> may not accept gifts with a value of more than \$250 in a calendar year from a 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 Gift Limit:

The following are not prohibited or limited by the Political Reform Act:

- -- The items listed in "Exceptions From Disclosure" in the instructions for "Completing Schedule F -- Gifts" of this disclosure form.
- -- Payments, advances, or reimbursements for travel and related lodging and subsistence as described in "Travel Payments." However, many payments for travel, lodging and subsistence must be disclosed.
- -- Wedding gifts. However, wedding gifts must be disclosed.

Gifts From Lobbyists: Elected <u>state</u> officers and certain <u>state</u> board and commission members and <u>state</u> agency officials and employees are prohibited from accepting a gift or gifts, including wedding gifts, aggregating more than \$10 in a month from a lobbyist or lobbying firm registered with the Secretary of State.

"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.

Honoraria Prohibition

<u>Elected State Officers</u> 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.

<u>Local Elected Officers</u> may not accept honoraria for any speech given, article published, or attendance at any public or private conference, convention, meeting, social event, meal, or like gathering, or gifts which aggregate more than \$1,000 from a single source in a calendar year.

1991-1992

STATEMENT OF ECONOMIC INTERESTS FOR DESIGNATED EMPLOYEES

FORM 730 AND INSTRUCTIONS

IF YOU ARE AN OFFICIAL OR EMPLOYEE WHOSE POSITION IS DESIGNATED IN A CONFLICT OF INTEREST CODE, USE THE FORM 730 TO FILE:







INITIAL STATEMENT

CANDIDATE STATEMENT

Prepared by the Fair Political Practices Commission P.O. Box 807
Sacramento, CA 95804-0807
Phone: (916) 322-5662

GIFT LIMITATIONS AND HONORARIA PROHIBITION

Gift Limitations

<u>Elected State Officers</u> 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 and honoraria with a value of more than \$1,000 in a calendar year from a single source.

State Board and Commission Members, and State Agency Officials and Designated Employees may not accept gifts with a value of more than \$250 in a calendar year from a 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 Gift Limit:

The following are not prohibited or limited by the Political Reform Act:

- -- The items listed in "Exceptions From Disclosure" in the instructions for "Completing Schedule F -- Gifts" of this disclosure form.
- -- Payments, advances, or reimbursements for travel and related lodging and subsistence as described in "Travel Payments." However, many payments for travel, lodging and subsistence must be disclosed.
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Gifts From Lobbyists: Elected <u>state</u> officers and certain <u>state</u> board and commission members and <u>state</u> agency officials and employees are prohibited from accepting a gift or gifts, including wedding gifts, aggregating more than \$10 in a month from a lobbyist or lobbying firm registered with the Secretary of State.

"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.

Honoraria Prohibition

<u>Elected State Officers</u> 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 honoraria for any speech given, article published, or attendance at any public or private conference, convention, meeting, social event, meal, or like gathering, or gifts which aggregate more than \$1,000 from a single source in a calendar year.

FORM 730

Statement of Economic Interests For Designated Employees

A PUBLIC DOCUMENT 1991/92

Date Received by Filing Official

(Type or Print in Ink)	1991/92	
NAME OF FILER		
NAME OF AGENCY	PO	SITION TITLE
MAILING ADDRESS		DAYTIME TELEPHONE NUMBER
CHECK THE APPROPRIATE BOX	(ES):	
ASSUMING OFFICE STATEMEN	Т:	
Date Positions subject to 9	State Senate confirmation File no later th	on 20 days often veve and distance
Date	rtate senate commitmation File no later (ii	an 30 days after your appointment.
All other positions	File no later than 30 days after you assume	e office.
You must disclose on Schedu business positions required t you must disclose on Schedu the 12 months prior to the d	ales A, B, C-1, C-2, and G all reportable inversely your disclosure category, held on the datales D, D-1, E, F, H-1, H-2 and H-3 income factoring assumed office.	estments, interests in real property and te you assumed your position. In addition, from all reportable sources received during
ANNUAL STATEMENT: (Require	d to be filed for each year that you hold yo	our designated position.)
You are required to file a stainterests in real property an January 1, 1991 through Dec	d business positions held and income receive	disclosing all reportable investments, ved during the period from
LEAVING OFFICE STATEMENT:	(Required to be filed when you leave your	designated position.)
You are leaving or have left date. You must disclose all income received during the	your position on and must reportable investments, interests in real pr period from <i>January 1, 1991 through the</i>	t file a statement no later than 30 days after that operty and business positions held and date you left your designated position.
INITIAL STATEMENT: (Check the	e box below ONLY if your position has been new Conflict of Interest Code for your agen	n recently designated or if you are filing accept.)
You must file a statement n G all reportable investment code or your designation be	s, interests in real property, and business po came effective. <i>In addition, you must disc</i> eportable sources received during the 12 n	ust disclose on Schedules A, B, C-1, C-2 and ositions held on the date your agency's close on Schedules D, D-1, E, F, and H-1, H-
	equired by the conflict of interest code of the king elective office.)	ne jurisdiction in which you are
☐ The conflict of interest code	e specifies the types of interests you must d	liadas Varanda and indiana in the

.

No.

THE FOLLOWING SUMMARY MUST BE COMPLETED BY ALL FILERS

(Do not complete this summary until you have carefully reviewed the instructions for each schedule)

SCHEDULE A INVESTMENTS (Which Are Not Held By A Business Entity Or Trust)				
☐ COMPLETED AND ATTACHED ☐ NO REPORTABLE INTERESTS ☐ SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE B INTERESTS IN REAL PROPERTY (Which Are Not Held By A Business Entity Or Trust)				
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE C-1 INTERESTS IN REAL PROPERTY HELD BY A BUSINESS ENTITY OR TRUST				
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE C-2 INVESTMENTS HELD BY A BUSINESS ENTITY OR TRUST				
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE D INCOME (Other Than Loans And Gifts)				
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE D-1 INCOME - TRAVEL PAYMENTS, ADVANCES, REIMBURSEMENTS				
☐ COMPLETED AND ATTACHED ☐ NO REPORTABLE INTERESTS ☐ SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE E INCOME - LOANS (Received Or Outstanding During The Reporting Period)				
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE F INCOME - GIFTS				
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE G BUSINESS POSITIONS				
☐ COMPLETED AND ATTACHED ☐ NO REPORTABLE INTERESTS ☐ SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE H-1COMMISSION INCOME RECEIVED BY BROKERS, AGENTS AND SALESPERSONS				
☐ COMPLETED AND ATTACHED ☐ NO REPORTABLE INTERESTS ☐ SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE H-2 INCOME AND LOANS TO BUSINESS ENTITIES OR TRUSTS				
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
SCHEDULE H-3INCOME FROM RENTAL PROPERTY				
COMPLETED AND ATTACHED NO REPORTABLE INTERESTS SCHEDULE DOES NOT APPLY TO MY DISCLOSURE CATEGORY				
VERIFICATION				
I have used all reasonable diligence in preparing this statement. I have reviewed the statement and to best of my knowledge the information contained herein and in the attached schedules is true complete.	the and			
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(City and State)				
SIGNATURE				

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

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT
OF INTEREST CODE TO DETERMINE THE TYPES OF INVESTMENTS YOU MUST DISCLOSE.

You must report as an investment any financial interest in any business entity located in or doing business in your jurisdiction in which <u>you or your immediate family</u> (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, sells or purchases 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 an office 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 <u>not</u> required to disclose the following investments:

- 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

EXAMPLE, SCHEDULE A

Assume that:

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 partnership in ABC Land Developers must be disclosed.

Schedule A should be completed as follows:

NAME OF BUSINESS ENTITY		VALUE	
ABC Land Developers		\$1,000-\$10,000 \$10,001-\$100,000	
NATURE OF INVESTMENT, E.G. COMMON STOCK, PARTNERSHIP INTEREST	If Acquired Or Disposed During The	X Over \$100,000	
Partnership Reporting Period, You Must In Month, Day And Year:		Ownership Interest	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired:	Less than 10%	
Land Developer	Date Disposed:	X 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 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.

NAME		
	 	 _

Schedule A - Investments (Which Are <u>Not</u> Held By A Business Entity Or Trust)

(SEE INSTRUCTIONS ON PRECEDING PAGE)

(SEE INSTRUCTIONS	ON PRECEDING PAGE)	
NAME OF BUSINESS ENTITY	- 119	VALUE \$1,000-\$10,000
NATURE OF INVESTMENT, e.g., COMMON STOCK, PARTNERSHIP INTEREST GENERAL DESCRIPTION OF BUSINESS ACTIVITY	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed:	\$10,001-\$100,000 Over \$100,000
NAME OF BUSINESS ENTITY		VALUE \$1,000-\$10,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	S10,001-\$100,000 Over \$100,000 Ownership Interest
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: Date Disposed:	Less than 10% 10% or greater*
NAME OF BUSINESS ENTITY		VALUE \$1,000-\$10,000 \$10,001-\$100,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: Date Disposed:	Less than 10% 10% or greater*
NAME OF BUSINESS ENTITY	1 12 11	VALUE \$1,000-\$10,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	\$10,001-\$100,000 Over \$100,000 Ownership Interest
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: Date Disposed:	Less than 10% 10% or greater*
NOTE: YOU MAY BE REQUIRED TO REPORT ON SCHEDULE D AN MORE) RECEIVED BY YOU OR YOUR SPOUSE FROM ANY BU	SINESS ENTITY LISTED ON SCHEDULE A.	
*If you have checked this box, you must report on sinvestments held by the business entity. In addition, source was \$10,000 or more, you may be required to re	if your pro rata share of the gr	oss income from any on

If additional space is needed, check box and attach an additional Sched	ule A.
---	--------

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

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INTERESTS YOU MUST DISCLOSE.

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.

Interests 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 interests in real property:

- 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.

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 join 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.

Schedule B should be completed as follows:

STREET ADDRESS OR PRECISE LOCATION OF PROPERTY 14738 Spruce Street		CITY Little Town	FAIR	\$1,000-\$10,000 \$\bar{X}\$\$10,001-\$100,000	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST Ownership			MARKET VALUE	Over \$100,000	
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	=	an 10% r 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.

Schedule B - Interests In Real Property (Which Are Not Held By A Business Entity Or Trust)

(SEE INSTRUCTIONS ON PRECEDING PAGE)

STREET ADDRESS OR PRECISE LOCATIO	N OF PROPERTY	CITY		
				FAIR \$1,000-\$10,000
			<u> </u>	MARKET \$10,001-\$100,000
NATURE OF INTEREST, E.G., OPTION, O	WNERSHIP, LEASEHOLD, D	DEED OF TRUS	īT	VALUE Over \$100,000
If Acquired Or Disposed During The	Date Acquired:	Ī	If Rental Property,	Less than 10%
Reporting Period You Must Indicate	Date Disposed:		Ownership Interest Is	10% or greater*
Month, Day And Year:				
STREET ADDRESS OR PRECISE LOCATION	N OF PROPERTY	CITY		
				FAIR \$1,000-\$10,000
NATURE OF INTEREST, E.G., OPTION, OV	WNERSHIP, LEASEHOLD, D	DEED OF TRUS	T	MARKET \$10,001-\$100,000
				VALUE Over \$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate	Date Acquired:		if Rental Property,	Less than 10%
Month, Day And Year:	Date Disposed:		Ownership Interest Is	10% or greater*
STREET ADDRESS OR PRECISE LOCATION	N OF PROPERTY	CITY		
				FAIR \$1,000-\$10,000
				MARKET \$10,001-\$100,000
NATURE OF INTEREST, E.G., OPTION, O	WNERSHIP, LEASEHOLD, [DEED OF TRUS	ST .	VALUE Over \$100,000
If Acquired Or Disposed During The			If Pantal Panas to	
Reporting Period You Must Indicate	Date Acquired: Date Disposed:		If Rental Property, Ownership Interest Is	Less than 10% 10% or greater*
Month, Day And Year:				10% of greater
STREET ADDRESS OR PRECISE LOCATION	N OF PROPERTY	CITY		
1				FAIR \$1,000-\$10,000
NATURE OF INTEREST, E.G., OPTION, OV	WNERSHIP, LEASEHOLD, D	EED OF TRUS	T	MARKET \$10,001-\$100,000
				VALUE Over \$100,000
		· · · · · · · · · · · · · · · · · · ·		
If Acquired Or Disposed During The Reporting Period You Must Indicate	Date Acquired:		If Rental Property,	Less than 10%
Month, Day And Year:	Date Disposed:		Ownership Interest Is	10% or greater*
NOTE: You may be required to r	eport on Schedule D	any incom	e (\$250 or more) receiv	ed by you or your spouse
from rental property listed on So	hedule B.	-		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
*If you have a 100/ or another				
*If you have a 10% or greater on Schedule H-3.	interest in a rental	property,	you may have addition	onal reporting requirements
☐ If additions	l space is pooded sh	ock box s=	d attach an additional S	Salan di da B
	i space is needed, CN	eck DOX dN	u attach an aggitional s	ocneaule B.

INFORMATION FOR COMPLETING SCHEDULE C-1 - Interests In Real Property Held By Business Entities Or Trusts

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPE OF INTERESTS YOU MUST DISCLOSE.

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:

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.

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

Reporting Assets Held By A Trust: You must disclose interests in real property held by any trust in which you have a 10% or greater interest, if your pro rata share of the 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, SCHEDULE C-1

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. The real property was not acquired or disposed of during the reporting period.

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

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 PRO AP 029 589202	PERTY Little Town			
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST Ownership			S	51,000-\$10,000 510,001-\$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired: Date Disposed:	VALUE	X	Over \$100,000

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

NAME		

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

	(Name Of Business Entity	Or Trust Holding	The Real Property)*
TREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY		
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST			\$1,000-\$10,000 \$10,001-\$100,000
f Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired:	VALUE	Over \$100,000
REET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY		
ATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASE	HOLD, DEED OF TRUST	FAIR MARKET VALUE	\$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000
f Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired:		
TREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY		
NATURE OF INTEREST, E.G., OPTION,OWNERSHIP, LEASEHOLD, DEED OF TRUST			\$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000
If Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year: Date Acquired: Date Disposed:			
TREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY		
JATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASE	HOLD, DEED OF TRUST	FAIR MARKET	\$1,000-\$10,000 \$10,001-\$100,000
f Acquired Or Disposed During The Reporting Period You Must Indicate Month, Day And Year:	Date Acquired:	VALUE	Over \$100,000
TREET ADDRESS OR PRECISE LOCATION OF PROPERTY	CITY		
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD, DEED OF TRUST			\$1,000-\$10,000 \$10,001-\$100,000
f Acquired Or Disposed During The Reporting Period You Must Indicate	Date Acquired:	VALUE	Over \$100,000
Month, Day And Year:			

INFORMATION FOR COMPLETING SCHEDULE C-2 - Investments Held By Business Entities Or Trusts

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES INTERESTS YOU MUST DISCLOSE.

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 investments:

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 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, SCHEDULE C-2

Assume that:

• ABC Land Developers owns common stock worth \$3,000 in Ajax Building Materials, which does business in your jurisdiction. The investment was not acquired or disposed of during the reporting period.

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

	Land Developers Business Entity Or Trust Holding The Investment(s))*		
NAME OF BUSINESS ENTITY Ajax Building Materials			(V)
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:	FAIR MARKET VALUE	\$1,000-\$10,000 \$10,001-\$100,000 Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired:		Over \$100,000
Manufactures Building Supplies	Date Disposed:		

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

NAME	

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

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

NAME OF BUSINESS ENTITY		
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: Date Disposed:	VALUE Over \$100,000
NAME OF BUSINESS ENTITY		
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired:	Over \$100,000
NAME OF BUSINESS ENTITY		
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year:	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Date Acquired: Date Disposed:	VALUE Over \$100,000
NAME OF BUSINESS ENTITY		
NAME OF BUSINESS ENTITY NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	If Acquired Or Disposed During The Reporting Period, You Must Indicate	FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000
	If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed:	
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	Reporting Period, You Must Indicate Month, Day And Year: Date Acquired:	MARKET \$10,001-\$100,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed: If Acquired Or Disposed During The Reporting Period, You Must Indicate	MARKET \$10,001-\$100,000 VALUE Over \$100,000 FAIR \$1,000-\$10,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP GENERAL DESCRIPTION OF BUSINESS ACTIVITY NAME OF BUSINESS ENTITY	Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed: If Acquired Or Disposed During The	MARKET \$10,001-\$100,000 VALUE Over\$100,000 FAIR \$1,000-\$10,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP GENERAL DESCRIPTION OF BUSINESS ACTIVITY NAME OF BUSINESS ENTITY NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP	Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed: If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: Date Acquired:	MARKET \$10,001-\$100,000 VALUE \$10,001-\$100,000 FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP GENERAL DESCRIPTION OF BUSINESS ACTIVITY NAME OF BUSINESS ENTITY NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP GENERAL DESCRIPTION OF BUSINESS ACTIVITY	Reporting Period, You Must Indicate Month, Day And Year: Date Acquired: Date Disposed: If Acquired Or Disposed During The Reporting Period, You Must Indicate Month, Day And Year: Date Acquired:	MARKET \$10,001-\$100,000 VALUE \$10,001-\$100,000 FAIR \$1,000-\$10,000 MARKET \$10,001-\$100,000

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

INFORMATION FOR COMPLETING SCHEDULE D - Income

(Other Than Loans, Gifts And Honoraria)

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

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 or a parent, subsidiary, or a related business entity:

Manufactures, distributes, sells or purchases 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 Schedule H-1-Commission Income.)

Salary/wages, per diem, reimbursement for expenses. (See exclusions below. Also see Schedule D-1-Income --

Travel Payments, Advances, Reimbursements.)
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 moré.

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.)

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.

Payments received under a defined benefit pension plan qualified under Internal Revenue Code Section 401(a).

EXAMPLE. SCHEDULE D

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

\$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.

<u>Schedule</u>	D should be completed as follows:	GROSS INCOME RECEIVED:
NAME OF THE	E SOURCE OF INCOME	
	Duplex	\$250 - \$1,000
ADDRESS	104 & 106 Main Street, Little Town, CA	
NATURE OF B	BUSINESS, IF ANY	X \$1,001 - \$10,000
	Rental Property	
DESCRIPTION	OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
	Rents	
NAME OF THE	E SOURCE OF INCOME	
	General Telephone Company	\$250 - \$1,000
ADDRESS	567 Main Street, Little Town, CA	
NATURE OF B	BUSINESS, IF ANY	X \$1,001 - \$10,000
	Manufactures Telephone Equipment	
DESCRIPTION	OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
	Spouse's Salary	

NAME		

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

	GROSS INCOME RECEIVED:
NAME OF THE SOURCE OF INCOME ADDRESS	. \$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
NAME OF THE SOURCE OF INCOME	<u> </u>
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000
NAME OF THE SOURCE OF INCOME	
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over\$10,000
NAME OF THE SOURCE OF INCOME	
ADDRESS	\$250 - \$1,000
NATURE OF BUSINESS ACTIVITY, IF ANY	\$1,001 - \$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED	Over \$10,000

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

INFORMATION FOR COMPLETING SCHEDULE D-1 - Income --Travel Payments, Advances, Reimbursements

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

Schedule D-1 is for disclosing payments, advances, or reimbursements for travel, including actual transportation and related lodging and subsistence. In lieu of disclosing travel payments on Schedule D-1, such payments may be disclosed as gifts on Schedule F, or as income on Schedule D.

Generally, travel payments are "gifts" and must be disclosed if you receive \$50 or more in such payments from a single source.

Travel payments are "income" if you have provided services which were equal to or greater in value than the payments for the travel. Income of \$250 or more received from a single source must be disclosed.

Government Code Section 82028 provides that any person, other than a defendant in a criminal action, who claims that a payment is not a gift by reason of receipt of consideration has the burden of proving that the consideration received is of equal or greater value.

Payment or reimbursement for travel <u>within California</u> in connection with an event at which you gave a speech, participated in a panel or seminar or performed a similar service is not required to be disclosed. However, travel payments in connection with such an event <u>outside</u> California must be disclosed.

Travel payments received from a state, local, or federal government agency, for which you have provided equal or greater consideration, are not required to be disclosed. If you have not provided equal or greater consideration for the payments, you may be required to disclose the payments as gifts.

Travel payments received from a bona fide educational, academic, or charitable organization, for which you have provided equal or greater consideration, are not required to be disclosed. If you have not provided equal or greater consideration for the payments, you may be required to disclose the payments as gifts.

EXAMPLE, SCHEDULE D-1

Assume that you attended a trade show in Mudville, CA.:

The American Manufacturers Assn. paid \$175 for your travel and accommodations

Schedule D-1 should be completed as follows:	DATE(S): (mo, day & yr)	AMOUNT(S):	PURPOSE AND LOCATION OF TRAVEL:
NAME OF SOURCE			
American Manufacturers Assn.	_	\$175	transportation and accommodations to
77 Green Lane, Mudville, CA	5/15/91		
NATURE OF BUSINESS ACTIVITY, IF ANY			
Trade Association			attend trade show
TYPE OF PAYMENT: (CHECK ONE) X GIFT INCOME			

Schedule D-1 - Income -- Travel Payments, Advances, Reimbursements (SEE INSTRUCTIONS ON PRECEDING PAGE)

	DATE(S): (mo, day & yr)	AMOUNT(S):	PURPOSE AND LOCATION OF TRAVEL:
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY	11		
TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME			
NAME OF SOURCE			
ADDRESS	= =		
NATURE OF BUSINESS ACTIVITY, IF ANY		-	
TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME		0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY			
TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME			
NAME OF SOURCE			
ADDRESS		44	_
NATURE OF BUSINESS ACTIVITY, IF ANY			
TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME		,9 ~	1 2 m m
NAME OF SOURCE			
ADDRESS			
NATURE OF BUSINESS ACTIVITY, IF ANY	а		
TYPE OF PAYMENT: (CHECK ONE) GIFT INCOME			
If additional space is needed, check box an	d attach an a	dditional Sched	dule D-1.

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

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

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, sells or purchases 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.

You are <u>not</u> 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 <u>principal</u> 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 vacation.

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.

Schedule E should be completed as follows:		DURING THE REPORTING PERIOD:
NAME OF LENDER		
Greatest Savings & Loan		\$250 - \$1,000
ADDRESS	· · · · · · · · · · · · · · · · · · ·	
123 Main Street, Little Town		\$1,001 - \$10,000
NATURE OF BUSINESS, IF ANY	WAS THE ENTIRE LOAN YES	X Over \$10,000
Lending Institution	REPAID DURING THE REPORTING PERIOD? X NO	711 Over \$10,000
SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (IF	Real Property, Provide Address)	INTEREST RATE
Personal Residence	NONE	14% NONE

NAME	

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

(SEE INSTRUCTIONS ON PRECEDING PAGE)

AMOUNT OF HIGHEST BALANCE DURING THE REPORTING PERIOD: NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN ☐ YES Over \$10,000 REPAID DURING THE REPORTING PERIOD? NO SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) INTEREST RATE NONE NONE NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN ☐ YES Over \$10,000 **REPAID DURING** THE REPORTING PERIOD? NO SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) INTEREST RATE NONE NONE NAME OF LENDER \$250 - \$1,000 **ADDRESS** \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN YES Over \$10,000 REPAID DURING THE REPORTING PERIOD? NO SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) INTEREST RATE NONE NONE NAME OF LENDER \$250 - \$1,000 ADDRESS \$1,001 - \$10,000 NATURE OF BUSINESS ACTIVITY, IF ANY WAS THE ENTIRE LOAN YES Over \$10,000 REPAID DURING THE REPORTING PERIOD? NO SPECIFIC SECURITY FOR LOAN INCLUDING GUARANTOR (If Real Property, Provide Address) INTEREST RATE NONE NONE

	If additional space is needed, check box and attach an additional Schedule E.
	II duditional space is needed, check box and attach an additional Schedule F
_	The state of the s

INFORMATION FOR COMPLETING-SCHEDULE F - Income -- Gifts

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

"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) 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.

See Schedule D-1- Income -- Travel Payments, Advances, Reimbursements for information concerning payments, including advances and reimbursements, for travel.

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.

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 plagues 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.

Schedule F should be completed as follows:	DATE(S) RECEIVED: (mo, day & yr)	VALUE(S):	DESCRIPTION OF GIFT(S):
NAME OF DONOR Valley Pipe Systems			
ADDRESS 200 E. Fifth, Hometown	March 1, 1991	\$200	Season tickets to Hometown A's
NATURE OF BUSINESS, IF ANY Manufactures Irrigation & Plumbing Supplies	4		baseball team

NAME	

Schedule F - Income -- Gifts

(SEE INSTRUCTIONS ON PRECEDING PAGE)

	DATE(S) RECEIVED: (mo, day & yr)	VALUE(S):	DESCRIPTION OF GIFT(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 F.

Information for SCHEDULE G: Business Positions

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF POSITIONS YOU MUST DISCLOSE.

- You must report the name of any business entity covered by your disclosure category for which you are a director, officer, partner, trustee, employee, or hold any position of management.
- Positions held in non-profit or charitable organizations or campaign committees are not reportable.

EXAMPLE, SCHEDULE G

Assume that:

• Your disclosure category requires you to disclose business positions in entities which are contractors, land developers, or manufacturers of equipment used by your agency. You have been a partner in ABC Land Developers during the entire reporting period. You would report that position as follows:

Schedule G should be completed as follows:

NAME OF BUSINE	SS ENTITY		ADDRESS OF ENTITY
ABC L	and Developers		5744 Tenth Street, Little Town
NATURE OF BUSI	NESS ACTIVITY, IF ANY		YOUR JOB TITLE OR POSITION
Land I	Developer		Partner
POSITION HELD 1	HROUGH ENTIRE REPORTING PERIOD?	IF NO	POSITION COMMENCED ON
X YES	□ NO	PLEASE II	NDICATE: POSITION TERMINATED ON

NAME		

Schedule G -- Business Positions (SEE INSTRUCTIONS ON PRECEDING PAGE)

NAME OF ENTITY			
NAME OF ENTITY		ADDRESS OF	ENTITY
DESCRIPTION OF BUILDINGS A CTIVITY		VOLUD 400 T	
DESCRIPTION OF BUSINESS ACTIVITY		YOUR JOB II	TLE OR POSITION
POSITION LIST D'THROUGH SATTIRS DEPORTANCE DEPORT			
POSITION HELD THROUGH ENTIRE REPORTING PERIOD?	IF NO		POSITION COMMENCED ON
YES NO	PLEASE IN	NDICATE:	POSITION TERMINATED ON
NAME OF ENTITY		ADDRESS OF	ENTITY
0.00		ADDITESS OF	ENTITY
DESCRIPTION OF BUSINESS ACTIVITY		YOUR JOB TI	TLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD?	IF NO		POSITION COMMENCED ON
YES NO		DICATE:	POSITION COMMENCED ONPOSITION TERMINATED ON
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NAME OF ENTITY		ADDRESS OF	ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	7 1	YOUR JOB TI	TLE OR POSITION
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YES NO	PLEASE INC	DICATE:	POSITION TERMINATED ON
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☐ If additional space is needed, check box and attach an additional Schedule G.

INFORMATION FOR COMPLETING SCHEDULE H-1-- Commission Income

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

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:

Smith and Jones Insurance Compan	у	
NAMES OF SOURCES OF INCOME		
XYZ Company		
Pusingsman's Insurance Common.	11	
Businessmen's Insurance Company		
NAME OF BUSINESS ENTITY		
NAME OF BUSINESS ENTITY		

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

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

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 also 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 also be reported on Schedule B. Your pro rata share of the gross rental income from the property must also be reported on Schedule D.

FPPC Regulation 18740 provides a 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 spouse's law firm and its client because your pro rata share (50%) of the \$20,000 paid to the law firm is \$10,000 and meets the reporting threshold.

Schedule H-2 would be completed as follows:

NAME OF BUSINESS ENTITY OR TRUST	ADDRESS OF BUSINESS ENTITY OR TRUST
ABC Land Developers	5744 Tenth Street, Little Town
NATURE OF BUSINESS, IF ANY	
Land Developers	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUS	SINESS ENTITY OR TRUST
Little Town Bank	2
NAME OF BUSINESS ENTITY OR TRUST	ADDRESS OF BUSINESS ENTITY OR TRUST
Smith and Jones	1261 High Street, Little Town
NATURE OF BUSINESS, IF ANY	
Law Firm	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUS	SINESS 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	CITY	
14738 Spruce Street	Little Town	
NAMES OF RENTERS		
Sylvan Taylor, M.D.		

NAME	

Schedule H

(SEE INSTRUCTIONS ON PRECEDING PAGES)

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Schedule H-2
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