[ms-0398.003.012.008]

FORM 730

Instructions for Completion of Form 730

Your agency has adopted a CONFLICT OF INTEREST CODE. You are a DESIGNATED EMPLOYEE under this Code. The law requires you, as a DESIGNATED EMPLOYEE, to file STATEMENTS OF ECONOMIC INTERESTS (FORM 730) disclosing certain of your financial interests.

You must file an INITIAL STATEMENT when the CONFLICT OF INTEREST CODE for your agency becomes effective, file an ASSUMING OFFICE STATEMENT when you assume office, an ANNUAL STATEMENT each year you remain in office, and a LEAVING OFFICE STATEMENT when you leave your position.

The types of interests which you must report on the FORM 730 are described in your DISCLOSURE CATEGORY, which is part of your agency's CONFLICT OF INTEREST CODE.

BEFORE YOU FILL OUT THIS FORM, MAKE SURE THAT YOUR FILING OFFICER HAS GIVEN YOU A COPY OF YOUR DISCLOSURE CATEGORY.

How to fill out Form 730

Step 1—Complete the heading of the cover page by indicating your name, your position with the agency you are filing for, the name of the agency, your mailing address and your telephone number.

Step 2—Check the box which reflects the type of Statement you are completing, making sure that you provide the reporting period covered.

Initial Statement

If you are filing an Initial Statement you must file your Statement within thirty days after the effective date of your Conflict of Interest Code. You must disclose your reportable interests held the effective date of the Code, but are not required to disclose income, gifts or loans. Turn to the Summary Page and check the box "Schedule not applicable" for Schedules D, E, F and H. Please proceed and complete the balance of the Statement.

Assuming Office Statement

If you are filing an Assuming Office Statement you must file your Statement thirty days after your appointment or nomination if your position is subject to State Senate confirmation, or thirty days after assuming office for all other positions. You must disclose your reportable interests held on the day you assumed office, but are not required to disclose income, gifts or loans. Turn to the Summary Page and check the box "Schedule not applicable" for Schedules D, E, F and H. Please proceed and complete the balance of the Statement.

Annual Statement

The period covered on an Annual Statement is the prior calendar year. If you are filing your first Annual Statement, you may have to modify the period covered on the form as follows:

1. If you assumed office after January 1, draw a line through "January 1" and write in the date you assumed office.

2. If your agency's Conflict of Interest Code became effective after January 1, draw a line through "January 1" and write in the date the Code became effective.

3. If you filed an Initial or Assuming Office Statement before January 1, and have not filed a Statement since, draw a line through "January 1" and write in the date your agency's Code became effective (if your last Statement was an Initial Statement), or the date you assumed office (if your last Statement was an Assuming Office Statement).

Consult your DISCLOSURE CATEGORY in the CONFLICT OF INTEREST CODE for your agency. Determine what schedules apply to your category. (Example: Investments—Schedules A and C-2; Real Property—Schedules B and C-1; Income—Schedules D, E, F and H; and Business Positions—Schedule G.)

Leaving Office Statement

The period covered on a Leaving Office Statement is January 1 of the current year through the date you leave office. If you leave office after December 31, but before the filing deadline for your Annual Statement, you may consolidate your Annual Statement and your Leaving Office Statement by checking the boxes for both "Annual Statement" and "Leaving Office Statement." If the filing deadline for the Leaving Office Statement is later than the annual filing date, you must inform the filing officer in writing before the deadline for filing the Annual Statement that you intend to follow this procedure.

You must file your Statement within thirty days of the date you leave your position. You must disclose all reportable interests held or received during the period from January 1 of the current year through the date you leave office.

Candidate Statement

Consult your CONFLICT OF INTEREST CODE to determine if a Candidate's Statement is required for your position.

If you are a candidate for elective office you must disclose all reportable interests, other than income, gifts and loans, held on the date you filed nomination papers. You must file this Statement no later than the final filing date of a Declaration of Candidacy.

Step 3—On the page preceding each schedule are general reporting instructions. Review the instructions and your DISCLOSURE CATEGORY. If you have reportable interests, you must complete the appropriate schedules.

NOTE: If your interests have not changed since a previously filed Statement, you may attach a copy of the schedule from your prior Statement, provided the copy is legible. Be sure to mark the box on the Summary Page indicating that the schedule has been completed and attached.

Step 4—After filling out the required schedules, complete the Summary Page indicating that the schedule has been completed and attached, or that you have no reportable interests, or that the schedule does not apply to your disclosure category or type of Statement.

Step 5—SIGN THE VERIFICATION and fill in the date and the city in which you completed this form.

Step 6—File your completed and verified Statement with your agency's filing officer.

PLEASE DETACH THESE INSTRUCTIONS FROM THE FORM PRIOR TO FILING.

For further information and examples of the Statement cover page, please see pages 1 through 5 of the Form 730 Manual.

FILER'S CHECKLIST

1. Have you obtained a copy of your DISCLOSURE CATEGORY from your filing officer?

2. Did you complete the cover page and indicate whether you are filing an Initial, Assuming Office, Annual, Leaving Office, or Candidate Statement?

3. Did you complete the Summary Page accurately? Make sure that a box has been checked for each schedule indicating that either the schedule is completed and attached; you have no reportable interests; or the schedule is not applicable to your disclosure category. NOTE: Gifts and loans are a type of income. If your disclosure category requires the disclosure of income, do not check "Schedule not applicable" to Schedules E or F.

4. Did you always include the precise location of real property, for example, address, assessor's parcel number, etc., including city or county?

5. If you have reported on Schedule C interests in real property or investments held by a business entity, did you report on Schedule A your investment in the business entity holding those interests?

6. When reporting your spouse's income, did you disclose the name of your spouse's employer or other source of income, not "Jane/John Doe, spouse"?

7. If reporting income from a deed of trust on Schedule D, did you report your interest in the real property on Schedule B?

8. If you have acquired or disposed of any interests during the reporting period, did you report the interests and indicate the date acquired or disposed?

9. Did you complete your Statement by signing, dating and indicating the city or county where the Statement is being signed on the verification? See Page 2 of the Statement.

INSTRUCTIONS FOR COMPLETING SCHEDULE A

General Information

BEFORE COMPLETING THIS SCHEDULE, REFER TO YOUR DISCLOSURE CATEGORY TO DETERMINE WHAT TYPE OF DISCLOSURE APPLIES TO YOU.

You must report investments of the type described in your *disclosure category*, located in, or doing business in, your agency's jurisdiction, in which you or your immediate family (your spouse and your dependent children) had an aggregate interest of more than $1,000, during the reporting period.

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

—Manufactures, distributes or sells products or services on a regular basis in the jurisdiction
—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 offices in the jurisdiction

The most common types of investments are:

—Sole proprietorships
—Partnerships (if you are a partner in a partnership, refer to the Form 730 Manual, page 7 for instructions on reporting requirements)
—Stocks and bonds, including those held in margin or brokerage accounts
—Individual Retirement Accounts (IRAs), refer to the Form 730 Manual at page 7 for exceptions.

You do **not** have to report investments in:

—Bank accounts and savings accounts
—Insurance policies
—Shares in a credit union
—Government bonds
—Diversified mutual funds registered with the SEC
—Common trust funds created under California Financial Code Section 1564

YOU MUST REPORT ON SCHEDULE D ANY SALARY, COMMISSION, DISTRIBUTION OR OTHER INCOME ($250 OR MORE) FROM INVESTMENTS LISTED ON SCHEDULE A RECEIVED BY YOU OR YOUR SPOUSE.

How To Fill Out Schedule A

—**Name of Business Entity**—Provide the complete name.

—**Nature of Interest**—For example, sole proprietorship, common stock, partnership interest.

—**General Description of Business Activity**—For example, clothing manufacturer, oil distributor, retail furniture sales.

—**Acquired or Disposed**—If the investment was acquired or disposed of **during the reporting period,** the investment must be reported, the appropriate box must be checked and the date provided.

—**Value**—Check the box which corresponds to the value of your investment. The value can be determined by using the highest fair market value of the asset during the reporting period.

—**Ownership Interest**—Check the box which corresponds to your ownership interest. If you check 10% or greater, you may have additional reporting requirements on Schedules C, D and H.

PLEASE TURN TO THE SUMMARY PAGE (PAGE 2) AND CHECK THE BOX WHICH INDICATES WHETHER OR NOT YOU HAD ANY REPORTABLE INTERESTS ON SCHEDULE A.

For further information and examples of Schedule A, please see page 7 of the Form 730 Manual.

Schedule A—Investments

(See Instructions on Preceding Page)

NAME OF BUSINESS ENTITY NATURE OF INTERESTS, E.G., COMMON STOCK, PARTNERSHIP INTEREST		VALUE ☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	☐ ACQUIRED ☐ DISPOSED DATE	OWNERSHIP INTEREST ☐ Less than 10% * ☐ 10% or greater
NAME OF BUSINESS ENTITY NATURE OF INTERESTS, E.G., COMMON STOCK, PARTNERSHIP INTEREST		VALUE ☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	☐ ACQUIRED ☐ DISPOSED DATE	OWNERSHIP INTEREST ☐ Less than 10% * ☐ 10% or greater
NAME OF BUSINESS ENTITY NATURE OF INTERESTS, E.G., COMMON STOCK, PARTNERSHIP INTEREST		VALUE ☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	☐ ACQUIRED ☐ DISPOSED DATE	OWNERSHIP INTEREST ☐ Less than 10% * ☐ 10% or greater
NAME OF BUSINESS ENTITY NATURE OF INTERESTS, E.G., COMMON STOCK, PARTNERSHIP INTEREST		VALUE ☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	☐ ACQUIRED ☐ DISPOSED DATE	OWNERSHIP INTEREST ☐ Less than 10% * ☐ 10% or greater
NAME OF BUSINESS ENTITY NATURE OF INTERESTS, E.G., COMMON STOCK, PARTNERSHIP INTEREST		VALUE ☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	☐ ACQUIRED ☐ DISPOSED DATE	OWNERSHIP INTEREST ☐ Less than 10% * ☐ 10% or greater

NOTE: YOU MUST REPORT ON SCHEDULE D ANY SALARY, COMMISSION, DISTRIBUTION OR OTHER INCOME ($250 OR MORE) FROM INVESTMENTS LISTED ON SCHEDULE A RECEIVED BY YOU OR YOUR SPOUSE.

* If you have checked this box, you may have to report the interests in real property and investments held by the business entity on Schedule C; your pro rata share of the business' total gross income on Schedule D; and if your pro rata share of the gross income from any one source was $10,000 or more, the name of that source on Schedule H.

INSTRUCTIONS FOR COMPLETING SCHEDULE B

General Information

BEFORE COMPLETING THIS SCHEDULE, REFER TO YOUR DISCLOSURE CATEGORY TO DETERMINE WHAT TYPE OF DISCLOSURE APPLIES TO YOU.

You must report interests in real property described in your disclosure category, located in your agency's jurisdiction, in which you or your immediate family had an aggregate interest of more than $1,000, during the reporting period.

An interest in real property is in the jurisdiction of a local agency if:

—It is located in or within two miles of the jurisdiction of the agency
—It is located in or within two miles of any land owned or used by the agency

An interest in real property is in the jurisdiction of a state agency if:

—It is located anywhere within the State of California

The most common types of interests in real property are:

—Ownership interests
—Deeds of trust
—Options to acquire real property interests
—Leasehold interests (see page 8 of the Form 730 Manual for a detailed explanation of leasehold interest)
—Easements

You are **not** required to report:

—Your principal place of residence unless it is also a place of business, for example, family farm or retail business, in which case you are only required to disclose that portion of the property which is used in connection with your business activities

How To Fill Out Schedule B

—**Street Address**—Provide the complete address including number, street, and city. If there is no number or street address, provide the parcel number or subdivision and lot number and the city.

—**Nature of Interest**—For example, equity, option, sole or part owner, deed of trust.

—**Acquired or Disposed**—If the property was acquired or disposed of **during the reporting period,** the property must be reported, the appropriate box must be checked and the date provided.

—**Value**—Check the box which corresponds to the value of your interest. (See page 9 of the Form 730 Manual to determine the value of your interest.)

—**Rental Property Ownership Interest**—Check the box which corresponds to your ownership interest. If you check 10% or greater, you may have additional reporting requirements on Schedules D and H.

PLEASE TURN TO THE SUMMARY PAGE (PAGE 2) AND CHECK THE BOX WHICH INDICATES WHETHER OR NOT YOU HAD ANY REPORTABLE INTERESTS ON SCHEDULE B.

For further information and examples of Schedule B, please see page 8 of the Form 730 Manual.

Name _____

Schedule B—Interests in Real Property

(See Instructions on Preceding Page)

STREET ADDRESS OR PRECISE LOCATION	CITY	VALUE	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD			☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
☐ ACQUIRED ☐ DISPOSED DATE		IF RENTAL PROPERTY, OWNERSHIP INTEREST IS:	☐ Less than 10% * ☐ 10% or greater
STREET ADDRESS OR PRECISE LOCATION	CITY	VALUE	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD			☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
☐ ACQUIRED ☐ DISPOSED DATE		IF RENTAL PROPERTY, OWNERSHIP INTEREST IS:	☐ Less than 10% * ☐ 10% or greater
STREET ADDRESS OR PRECISE LOCATION	CITY	VALUE	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD			☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
☐ ACQUIRED ☐ DISPOSED DATE		IF RENTAL PROPERTY, OWNERSHIP INTEREST IS:	☐ Less than 10% * ☐ 10% or greater
STREET ADDRESS OR PRECISE LOCATION	CITY	VALUE	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD			☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
☐ ACQUIRED ☐ DISPOSED DATE		IF RENTAL PROPERTY, OWNERSHIP INTEREST IS:	☐ Less than 10% * ☐ 10% or greater
STREET ADDRESS OR PRECISE LOCATION	CITY	VALUE	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD			☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
☐ ACQUIRED ☐ DISPOSED DATE		IF RENTAL PROPERTY, OWNERSHIP INTEREST IS:	☐ Less than 10% * ☐ 10% or greater
STREET ADDRESS OR PRECISE LOCATION	CITY	VALUE	
NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD			☐ $1,001 – $10,000 ☐ $10,001 – $100,000 ☐ Over $100,000
☐ ACQUIRED ☐ DISPOSED DATE		IF RENTAL PROPERTY, OWNERSHIP INTEREST IS:	☐ Less than 10% * ☐ 10% or greater

NOTE: YOU MUST REPORT ON SCHEDULE D ANY INCOME ($250 OR MORE) FROM REAL PROPERTY LISTED ON SCHEDULE B RECEIVED BY YOU OR YOUR SPOUSE.

* If you have checked this box, you may have to report your pro rata share of the total gross rental income (if $250 or more) on Schedule D, and if your pro rata share of the gross rental income from any source was $10,000 or more, you may have to report the name of that source on Schedule H (not applicable to assuming office or candidate Statements).

INSTRUCTIONS FOR COMPLETING SCHEDULES C-1 AND C-2

General Information

BEFORE COMPLETING THIS SCHEDULE, REFER TO YOUR DISCLOSURE CATEGORY TO DETERMINE WHAT TYPE OF DISCLOSURE APPLIES TO YOU.

During the reporting period, did you or your immediate family have a 10% or greater interest in **any** business entity or trust covered by your **disclosure category?**

NO—You do not have to complete this schedule. Please check the "no reportable interests" box on the Summary Page and discard Schedule C

YES—Continue reading below

If yes, did the business entity or trust hold interests in real property or investments of the type covered by your **disclosure category located in or doing business in your jurisdiction?** (See Schedule A instruction page for an explanation of "jurisdiction".)

NO—You do not have to complete this schedule. Please check the "no reportable interests" box on the Summary Page and discard Schedule C

YES—You must report such interests in real property or investments owned by the business entity or trust on Schedule C if:

—Your pro rata share in any interest in real property was more than $1,000 (report on Schedule C-1)

—Your pro rata share in any investment was more than $1,000 (report on Schedule C-2)

IN ADDITION, YOU MAY HAVE TO REPORT THE BUSINESS ENTITY HOLDING SUCH INVESTMENTS OR INTERESTS IN REAL PROPERTY AS AN INVESTMENT ON SCHEDULE A.

How To Fill Out Schedule C-1—Interests In Real Property

—**Name of Business Entity or Trust Holding Interests in Real Property**—Provide the complete name.

—**Street Address**—Provide the complete address including number, street and city. If there is no number or street address, provide the parcel number or subdivision and lot numbers and the city.

—**Nature of Interest**—For example, equity, option, sole or part owner, deed of trust.

—**Acquired or Disposed**—If the property was acquired or disposed of **during the reporting period,** the property must be reported, the appropriate box must be checked and the date provided.

—**Value**—Check the box which corresponds to the value of your interests. (See page 9 of the Form 730 Manual to determine the value of your interest.)

How To Fill Out Schedule C-2—Investments

—**Name of Business Entity or Trust Holding Investments**—Provide the complete name of the business entity which holds the investment.

—**Name of Business Entity**—Provide the complete name of the business entity in which the holding business entity had an investment.

—**General Description of Business Activity**—For example, clothing manufacturer, oil distributor, retail furniture sales.

—**Acquired or Disposed**—If the investment was acquired or disposed of **during the reporting period,** the investment must be reported, the appropriate box must be checked and the date provided.

—**Value**—Check the box which corresponds to the value of your investment.

PLEASE TURN TO THE SUMMARY PAGE (PAGE 2) AND CHECK THE BOX WHICH INDICATES WHETHER OR NOT YOU HAD ANY REPORTABLE INTERESTS ON SCHEDULE C.

For further information and examples of Schedules C-1 and C-2, please see page 10 of the Form 730 Manual.

Name _____

Schedule C—Interests in Real Property and Investments Held by Business Entities or Trusts

(See Instructions on Preceding Page)

Schedule C-1

Interests in Real Property

NAME OF BUSINESS ENTITY OR TRUST HOLDING INTERESTS IN REAL PROPERTY

STREET ADDRESS OR PRECISE LOCATION | CITY

NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD

☐ ACQUIRED
☐ DISPOSED DATE

VALUE
☐ $1,001–$10,000
☐ $10,001–$100,000
☐ Over $100,000

STREET ADDRESS OR PRECISE LOCATION | CITY

NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD

☐ ACQUIRED
☐ DISPOSED DATE

VALUE
☐ $1,001–$10,000
☐ $10,001–$100,000
☐ Over $100,000

STREET ADDRESS OR PRECISE LOCATION | CITY

NATURE OF INTEREST, E.G., OPTION, OWNERSHIP, LEASEHOLD

☐ ACQUIRED
☐ DISPOSED DATE

VALUE
☐ $1,001–$10,000
☐ $10,001–$100,000
☐ Over $100,000

Schedule C-2
Investments

NAME OF BUSINESS ENTITY OR TRUST HOLDING INVESTMENTS

NAME OF BUSINESS ENTITY

NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST

GENERAL DESCRIPTION OF BUSINESS ACTIVITY | ☐ ACQUIRED ☐ DISPOSED DATE

VALUE
☐ $1,001–$10,000
☐ $10,001–$100,000
☐ Over $100,000

NAME OF BUSINESS ENTITY

NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST

GENERAL DESCRIPTION OF BUSINESS ACTIVITY | ☐ ACQUIRED ☐ DISPOSED DATE

VALUE
☐ $1,001–$10,000
☐ $10,001–$100,000
☐ Over $100,000

NAME OF BUSINESS ENTITY

NATURE OF INVESTMENT, E.G., COMMON STOCK, PARTNERSHIP INTEREST

GENERAL DESCRIPTION OF BUSINESS ACTIVITY | ☐ ACQUIRED ☐ DISPOSED DATE

VALUE
☐ $1,001–$10,000
☐ $10,001–$100,000
☐ Over $100,000

INSTRUCTIONS FOR COMPLETING SCHEDULE D

General Information

BEFORE COMPLETING THIS SCHEDULE, REFER TO YOUR DISCLOSURE CATEGORY TO DETERMINE WHAT TYPE OF DISCLOSURE APPLIES TO YOU.

You must report your **gross** income, including your community property interest in your spouse's gross income, from sources described in your **disclosure category.** Gross income is the total amount before deducting expenses or losses. Income includes all payments aggregating $250 or more received during the reporting period from any source located in, or doing business in, your agency's jurisdiction.

Reportable income includes:

—Salary/wages
—Payments you received from a business entity (including rental property) or a trust in which you or your spouse did not have a 10% or greater interest. If you or your spouse did have a 10% or greater interest in a business entity (including rental property) or a trust, you must report your pro rata share of the total gross payments received by the business entity or trust.
—Your community property interest in your spouse's income
—Proceeds from any sale, including the sale of a house or car
—Forgiveness or payment of indebtedness received by you
—Per diem (see exclusions below)
—Reimbursement for expenses (see exclusions below)
—Interest (see exclusions below)
—Honorarium payments (see page 12 of the Form 730 Manual and Schedule F—Gifts, for a detailed explanation of honoraria and benefits in connection with honoraria)

You are **not** required to report:

—Salary or reimbursements for expenses and per diem received 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
—Devise or inheritance
—Dividends, interest or other return on a security which is registered with the SEC
—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 government bond
—Income of dependent children
—Redemption of mutual funds
—Alimony or child support payments
—Payments received under a defined benefit pension plan qualified under Internal Revenue Code Section 401(a)

How To Fill Out Schedule D

—**Name of Source of Income**—Provide the complete name of the individual, business, etc.

—**Address of Source of Income**—Provide the complete address including number, street and city.

—**Business Activity of Source of Income**—For example, law firm, insurance brokerage, real estate company.

—**Description of the Consideration for Which Income Was Received**—For example, payment for consulting services, sale of auto, salary.

—**Amount**—Check the box which corresponds to the gross income received.

PLEASE TURN TO THE SUMMARY PAGE (PAGE 2) AND CHECK THE BOX WHICH INDICATES WHETHER OR NOT YOU HAD ANY REPORTABLE INTERESTS ON SCHEDULE D.

For further information and examples of Schedule D, please see Page 12 of the Form 730 Manual.

Name _____

Schedule D—Income (Other than Gifts and Loans)

(See Instructions on Preceding Page)

NAME OF SOURCE OF INCOME		
ADDRESS OF SOURCE OF INCOME	AMOUNT	☐ $250–$1,000
BUSINESS ACTIVITY OF SOURCE OF INCOME, IF ANY		☐ $1,001–$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED		☐ Over $10,000
NAME OF SOURCE OF INCOME		
ADDRESS OF SOURCE OF INCOME	AMOUNT	☐ $250–$1,000
BUSINESS ACTIVITY OF SOURCE OF INCOME, IF ANY		☐ $1,001–$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED		☐ Over $10,000
NAME OF SOURCE OF INCOME		
ADDRESS OF SOURCE OF INCOME	AMOUNT	☐ $250–$1,000
BUSINESS ACTIVITY OF SOURCE OF INCOME, IF ANY		☐ $1,001–$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED		☐ Over $10,000
NAME OF SOURCE OF INCOME		
ADDRESS OF SOURCE OF INCOME	AMOUNT	☐ $250–$1,000
BUSINESS ACTIVITY OF SOURCE OF INCOME, IF ANY		☐ $1,001–$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED		☐ Over $10,000
NAME OF SOURCE OF INCOME		
ADDRESS OF SOURCE OF INCOME	AMOUNT	☐ $250–$1,000
BUSINESS ACTIVITY OF SOURCE OF INCOME, IF ANY		☐ $1,001–$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED		☐ Over $10,000

INSTRUCTIONS FOR COMPLETING SCHEDULE E

General Information

BEFORE COMPLETING THIS SCHEDULE, REFER TO YOUR DISCLOSURE CATEGORY TO DETERMINE WHAT TYPE OF DISCLOSURE APPLIES TO YOU.

You must report loans, including real estate loans and margin accounts, to you or your spouse aggregating $250 or more which were received or were outstanding during the reporting period from any source of income covered by your **disclosure category** located in, or doing business in, your agency's jurisdiction.

You are **not** required to report:

—Any loan from a commercial lending institution used to purchase, refinance the purchase of, or for improvements to, your principal place of residence
—Any loans from a commercial lending institution which did not exceed $10,000 at any time during the reporting period
—Any indebtedness of less than $10,000 created as part of a retail installment or credit transaction
—Any loan from a 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, unless the lender was acting as an intermediary or agent for any person not covered by this provision

How To Fill Out Schedule E

For Each Loan You Must Report:

—**Name of Lender**—Provide the complete name of the lender.

—**Address of the Lender**—Provide the complete address, including city.

—**Business Activity of Lender**—For example, bank, savings and loan, lawyer, real estate developer.

—**Security for Loan**—If security was offered in exchange for the loan (property, stocks), list the security **or** check the box indicating **none.**

—**Entire Loan Repaid**—If the loan was repaid during the reporting period, provide its highest balance during the period and check the "entire loan repaid" box.

—**Amount of Highest Balance**—Check the appropriate box which indicates the highest amount outstanding on the loan at any time during the reporting period.

—**Interest Rate**—Indicate the interest rate that you are paying on the loan **or** check the box indicating **none.**

PLEASE TURN TO THE SUMMARY PAGE (PAGE 2) AND CHECK THE BOX WHICH INDICATES WHETHER OR NOT YOU HAD ANY REPORTABLE INTERESTS ON SCHEDULE E.

For further information and examples of Schedule E, please see page 14 of the Form 730 Manual.

Schedule E—Income (Loans)

(Received or outstanding during reporting period)

(See instructions on Preceding Page)

NAME OF LENDER		AMOUNT OF HIGHEST BALANCE	☐ $250–$1,000
ADDRESS OF LENDER			☐ $1,001–$10,000
BUSINESS ACTIVITY OF LENDER			☐ Over $10,000
SECURITY FOR LOAN	☐ NONE	ENTIRE LOAN REPAID ☐	INTEREST RATE ☐ NONE
NAME OF LENDER		AMOUNT OF HIGHEST BALANCE	☐ $250–$1,000
ADDRESS OF LENDER			☐ $1,001–$10,000
BUSINESS ACTIVITY OF LENDER			☐ Over $10,000
SECURITY FOR LOAN	☐ NONE	ENTIRE LOAN REPAID ☐	INTEREST RATE ☐ NONE
NAME OF LENDER		AMOUNT OF HIGHEST BALANCE	☐ $250–$1,000
ADDRESS OF LENDER			☐ $1,001–$10,000
BUSINESS ACTIVITY OF LENDER			☐ Over $10,000
SECURITY FOR LOAN	☐ NONE	ENTIRE LOAN REPAID ☐	INTEREST RATE ☐ NONE
NAME OF LENDER		AMOUNT OF HIGHEST BALANCE	☐ $250–$1,000
ADDRESS OF LENDER			☐ $1,001–$10,000
BUSINESS ACTIVITY OF LENDER			☐ Over $10,000
SECURITY FOR LOAN	☐ NONE	ENTIRE LOAN REPAID ☐	INTEREST RATE ☐ NONE
NAME OF LENDER		AMOUNT OF HIGHEST BALANCE	☐ $250–$1,000
ADDRESS OF LENDER			☐ $1,001–$10,000
BUSINESS ACTIVITY OF LENDER			☐ Over $10,000
SECURITY FOR LOAN	☐ NONE	ENTIRE LOAN REPAID ☐	INTEREST RATE ☐ NONE
NAME OF LENDER		AMOUNT OF HIGHEST BALANCE	☐ $250–$1,000
ADDRESS OF LENDER			☐ $1,001–$10,000
BUSINESS ACTIVITY OF LENDER			☐ Over $10,000
SECURITY FOR LOAN	☐ NONE	ENTIRE LOAN REPAID ☐	INTEREST RATE ☐ NONE

INSTRUCTIONS FOR COMPLETING SCHEDULE F

General Information

BEFORE COMPLETING THIS SCHEDULE, REFER TO YOUR DISCLOSURE CATEGORY TO DETERMINE WHAT TYPE OF DISCLOSURE APPLIES TO YOU.

You must disclose gifts aggregating $50 or more received during the reporting period from any source of income covered by your **disclosure category.**

You are **not** required to report:

—Gifts of food, drink or lodging provided in an individual's home
—Gifts of approximate equal value exchanged between you and any individual, other than a lobbyist, on holidays, birthdays, or similar occasions
—Gifts of informational materials, for example, books, pamphlets, reports, calendars or periodicals
—Gifts from family members
—Gifts which were not used and which were returned within thirty days to the donor or delivered to a charitable organization without being claimed for income tax purposes
—Any bequest or inheritance

REPORTING HONORARIA

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

Reportable honoraria include:

—Payments of $50 or more
—Any extra benefits provided which were not provided directly in connection with the event
—Reimbursement or payment for travel **outside** California

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

—Free admission
—Food and beverage
—Similar nominal benefits
—Reimbursement or advance for travel **within** California

An employee of a State agency who wishes to accept an honorarium from a lobbyist who is registered to influence his or her agency should consult FPPC Regulation 18623.

How To Fill Out Schedule F

—**Name of Donor**—Provide the complete name of the source. If you received a gift through an intermediary, you must disclose the name, address and business activity of both the donor and the intermediary.

—**Address of Donor**—Provide the complete address.

—**Business Activity of Donor**—Provide the type of business activity in which the donor was engaged.

—**Date of Gift**—Provide the date upon which the gift was received.

—**Value of Gift**—Provide the exact value (if known) or approximate value of the gift received.

—**Description of Gift**—Provide an accurate description of the gift received.

PLEASE TURN TO THE SUMMARY PAGE (PAGE 2) AND CHECK THE BOX WHICH INDICATES WHETHER OR NOT YOU HAD ANY REPORTABLE INTERESTS ON SCHEDULE F.

For further information and examples of Schedule F, please see page 14 of the Form 730 Manual.

Schedule F—Income (Gifts)

(See Instructions on Preceding Page)

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

INSTRUCTIONS FOR COMPLETING SCHEDULE G

General Information

BEFORE COMPLETING THIS SCHEDULE, REFER TO YOUR DISCLOSURE CATEGORY TO DETERMINE WHAT TYPE OF DISCLOSURE APPLIES TO YOU.

If you are required to disclose business positions under your agency's **conflict of interest code,** you must report the name of the business entity for which you were a director, officer, partner, trustee, or employee or held any position of management.

How To Fill Out Schedule G

—**Name of Entity**—Provide the complete name of the business entity for which you held a business position.

—**Address of Entity**—Provide the complete address including number, street and city.

—**Description of Business Activity**—Provide a description of the activity in which the business entity was engaged.

—**Your Job Title or Position**—Provide your job title or position held.

—**Position Held Through Entire Reporting Period**—Check the box which indicates if you held this job title or position throughout the entire reporting period.

—**Position Commenced On**—Provide the date when you commenced your position with this business entity, if not held during the entire period.

—**Position Terminated On**—Provide the date you terminated if your position with this business entity was not held through the entire period.

PLEASE TURN TO THE SUMMARY PAGE (PAGE 2) AND CHECK THE BOX WHICH INDICATES WHETHER OR NOT YOU HAD ANY REPORTABLE INTERESTS ON SCHEDULE G.

For further information and examples of Schedule G, please see page 16 of the Form 730 Manual.

Schedule G—Business Positions

(See Instructions on Preceding Page)

NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? ☐ Yes ☐ No	POSITION COMMENCED ON _____ POSITION TERMINATED ON _____
NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? ☐ Yes ☐ No	POSITION COMMENCED ON _____ POSITION TERMINATED ON _____
NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? ☐ Yes ☐ No	POSITION COMMENCED ON _____ POSITION TERMINATED ON _____
NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? ☐ Yes ☐ No	POSITION COMMENCED ON _____ POSITION TERMINATED ON _____
NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? ☐ Yes ☐ No	POSITION COMMENCED ON _____ POSITION TERMINATED ON _____
NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? ☐ Yes ☐ No	POSITION COMMENCED ON _____ POSITION TERMINATED ON _____
NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? ☐ Yes ☐ No	POSITION COMMENCED ON _____ POSITION TERMINATED ON _____

INSTRUCTIONS FOR COMPLETING SCHEDULES H-1 AND H-2

General Information

BEFORE COMPLETING THIS SCHEDULE, REFER TO YOUR DISCLOSURE CATEGORY TO DETERMINE WHAT TYPE OF DISCLOSURE APPLIES TO YOU.

During the reporting period, did you or your spouse have a 10% or greater interest in **any** business entity or rental property covered by your **disclosure category?**

NO—You do not need to complete this schedule. Please check the "no reportable interests" box on the Summary Page and discard Schedule H

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, including loans received or outstanding, to the business entity, provided that your pro rata share of such payments or receipts was $10,000 or more and the source of income was of the type covered by your disclosure category; or

—made rent payments, provided that your pro rata share of such receipts was $10,000 or more, and the source of income was of the type covered by your disclosure category.

This reporting requirement is determined by the jurisdiction of the source of loan or income—not by the jurisdiction of the business entity 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 WITHIN YOUR JURISDICTION, AND WAS OF THE TYPE COVERED BY YOUR **DISCLOSURE CATEGORY,** IT MUST ALSO BE REPORTED ON SCHEDULE A AND POSSIBLY SCHEDULE C. IF THE RENTAL PROPERTY IS LOCATED WITHIN YOUR JURISDICTION, IT MUST BE REPORTED ON SCHEDULE B.

How To Fill Out Schedule H-1—Income And Loans To Business Entities

—**Name of Business Entity**—Provide the complete name of the business entity which received the income or loan.

—**Address of the Business Entity**—Provide the complete address of the business entity which received the income or loan.

—**Activity of Business Entity**—Provide a description of the activity in which the business entity was engaged. For example, clothing manufacturer, oil distributor, retail furniture sales.

—**Names of Sources of Income and Loans**—Provide the complete name of the lender or source of income.

NOTE: FPPC Regulation 2 Cal. Adm. Code Section 18740 contains information regarding exemption of clients' names from disclosure pursuant to a legally recognized privilege under California law. You may obtain a copy of Regulation Section 18740 by contacting the Fair Political Practices Commission.

How To Fill Out Schedule H-2—Income From Rental Property

—**Address of Rental Property**—Provide the complete address of the rental property for which the income was received.

—**Name of Renters**—Provide the complete name of the person or persons who are renting or leasing the property

PLEASE TURN TO THE SUMMARY PAGE (PAGE 2) AND CHECK THE BOX WHICH INDICATES WHETHER OR NOT YOU HAD ANY REPORTABLE INTERESTS ON SCHEDULE H.

For further information and examples of Schedule H, please see page 17 of the Form 730 Manual.

Schedule H—Income and Loans to Business Entities (Including Rental Property)

(See Instructions on Preceding Page)

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BOARD OF SUPERVISORS CO. OF SAN DIEGO

SCHEDULE H-1

Income and Loans to Business Entities

NAME OF BUSINESS ENTITY	ADDRESS OF BUSINESS ENTITY
ACTIVITY OF BUSINESS ENTITY	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY	

NAME OF BUSINESS ENTITY	ADDRESS OF BUSINESS ENTITY
ACTIVITY OF BUSINESS ENTITY	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY	

SCHEDULE H-2

Income from Rental Property

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

ADDRESS OF RENTAL PROPERTY	
NAME(S) OF RENTERS	