[ms-0398 720 012.001] 4TH DIST.

APPLICATION MATERIALS

FOR

FILLING VACANCY IN OFFICE OF

SUPERVISOR - THIRD DISTRICT

MAY, 1983

Prepared
by
County Counsel
and
Clerk of the Board of Supervisors
County of San Diego
State of California



MRS. PORTER D. CREMANS

CLERK OF THE
BOARD OF SUPERVISORS

COUNTY OF SAN DIEGO

CLERK OF THE BOARD OF SUPERVISORS • 1600 PACIFIC HWY. • ROOM 402 SAN DIEGO, CALIFORNIA 92101 • (619) 236-2321

May 24, 1983

BOARD OF SUPERVISORS

TOM HAMILTON

PAUL W. FORDEM SECOND DISTRICT ROGER HEDGECOCK

LEON L. WILLIAMS

PAUL ECKERT

TO ALL APPLICANTS FOR APPOINTMENT TO THE OFFICE OF SUPERVISOR - THIRD DISTRICT

You are being furnished with the following forms which must be completed and returned by each applicant personally to the office of the Clerk of the Board of Supervisors, Room 402, 1600 Pacific Highway, San Diego, California 92101, no later than 5:00 p.m. on TUESDAY, MAY 31, 1983.

- Application for Appointment to Office of Supervisor -Third District
- 2. Applicant's Statement of Qualifications
- Applicant's Statement of Reasons for Wishing to be Appointed Supervisor
- 4. Statements of Economic Interests Form (Form 721)

In addition to the above forms you are also being furnished the following documents for your information:

- 1. Map of boundaries of Third Supervisorial District
- 2. Schedule for Appointment Procedure
- Copy of San Diego County Charter Section 401.4, Board of Supervisors Policy A-39 with Implementing Procedures, and List of Disqualifying Crimes.
- 4. Instruction Manual for Statements of Economic Interests Form

The Board has established FRIDAY, JUNE 3, 1983, at 10:00 a.m. as the date and time for the first public hearing to consider the applications.

The date and time of the second public hearing is WEDNESDAY,
JUNE 8, 1983, at 2:00 p.m.

PORTER D. CREMANS Clerk of the Board of Supervisors

PDC:dl Encs.

APPLICATION FOR APPOINTMENT TO THE OFFICE OF SUPERVISOR, THIRD DISTRICT I, _____, say that I reside at (Apt.) (Street) (City) (State) (Zip) that I am a registered voter of the Third Supervisorial District for which I seek office and shall have been such for at least thirty (30) days prior to May 31, 1983; that I am at least 18 years of age; that I have not been convicted of any crimes specified in the Constitution and laws of the State of California which disqualify me from holding public office; that I will be a citizen of the State of California on the date of my appointment; and that I hereby apply for the office of Supervisor, Third District, which is to be filled by appointment pursuant to the

Charter of the County of San Diego. Length of residence at above address ADDRESSES FOR PAST 5 YEARS OTHER THAN ABOVE Date of Birth Place of Birth BUSINESS OR OCCUPATION ENGAGED IN DURING PAST 5 YEARS:

COUNTY OF SAN DIEGO

(Number)

Business or Occupation Address Date of Service

APPLICANT'S STATEMENT OF QUALIFICATIONS

APPLICANT'S STATEMENT OF REASONS FOR WISHING TO BE APPOINTED SUPERVISOR (500-word maximum)

yrani ta	
DATE:	(Signature of Applicant



FORM 721

Statement of Economic Interests

Important Notice To Filers: The Political Reform Act is intended to prevent conflicts of interests by requiring public officials such as yourself to disclose financial interests which could foreseeably cause conflicts. In addition, as a public official, you may be required to disqualify yourself from making, participating in, or attempting to influence any governmental decision which will affect your financial interests, including those you are required to report on this Statement. The Fair Political Practices Commission's Guide to the Political Reform Act: California's Conflict of Interest Law for Public Officials explains what a conflict of interest is, and when disqualification is required by law. Failure to file your Statement before the filing deadline may result in penalties including but not limited to late fines.

Name					76165	NEW TRANSPER
Office H	eld or Sought (e.g. co	ounty supervisor, city council	member, etc.)			
Mailing	Address				Tele	phone Number
	State of California	☐ County o	of		☐ City of _	
Che	ck the appropr	riate box(es):				
		STATEMENT. File B and C disclosing i			or your declara	tion of candidacy. Complete
		OFFICE STATEMEN should instead file a				ning office in December or
	days at					er or January). File within 30 held on the date of assuming
	ments.		after assuming office			nmission on Judicial Appoint- C disclosing interests held on
	File wit		pointment or nomina	tion. Complete So		ion on Judicial Appointments. nd C disclosing interests held
	file between		1. Complete all Sch			h 1. City and county officials or received at any time during
		Covered: Disclose and December 31, 198		sts held or receiv	ed during the p	eriod from January 1, 198
						ete all Schedules disclosing

Page 1 721 (8/82)

Name			
realing.			

The Following Summary Must Be Completed By All Filers
Only Schedules A, B and C are Required for Candidate Statements
and Assuming Office Statements

Do not complete this summary until you have reviewed all schedules and the attached instructions carefully.

SC	HEDULE A-Investments		
	Schedule completed and attached		No reportable interests
sc	HEDULE B-Interests in Real Property		
	Schedule completed and attached		No reportable interests
sc	HEDULE C-Interests in Real Property and Investments H	eld by Busin	ness Entities or Trusts
	Schedule completed and attached		No reportable interests
sc	HEDULE D-Income (other than Gifts and Loans)		
	Schedule completed and attached		No reportable interests
sci	HEDULE E-Loans		
	Schedule completed and attached		No reportable interests
SCI	HEDULE F—Gifts		
	Schedule completed and attached		No reportable interests
SCH	HEDULE G—Honoraria		
	Schedule completed and attached		No reportable interests
SCH	HEDULE H-Income and Loans to Business Entities		
	Schedule completed and attached		No reportable interests
atta	E: Filers whose reportable interests on any particular schedule has checked on the appropriate schedule from the previous annual Sing to report.	ave not chang Statement. Ple	ed since a previously filed annual Statement may lase discard those Schedules on which you have
	VERIFICAT	TION	
l de the	clare under penalty of perjury that I have used all reasonable attached schedules and to the best of my knowledge the infor	diligence in p	preparing this Statement, that I have reviewed ded in this Statement is true and correct.
	cuted on, 1	9, at .	

Filing this Statement may not relieve you of the obligation to file under the Conflict of Interest Code for any other agency. Consult your filing officer or the Fair Political Practices Commission.

All of the information required by this form is mandatory, is required by the provisions of the Political Reform Act. Government Code Sections 8 1000, er seq., and will be available to any member of the public upon request. This information is to be used to reveal to public scrutiny certain financial interests of public officials in order to disclose potential conflicts of interests and to aid in the prevention of actual conflicts of interests.

NOTE TO AGENCIES: Make and retain copies of all Statements filed with you and forward the originals within five days of the filing deadline (or if filed late, within five days of receipt) to: The Fair Political Practices Commission, Legal Division, P.O. Box 807, Sacramento, California 95804, (916) 322-6444,

Name	

Schedule A-Investments

You must report investments in business entities located in, or doing business in, your jurisdiction, in which you and your immediate family had an aggregate interest of more than \$1,000 during the reporting period. For each investment indicate both the value and the ownership interest in the boxes provided.

NAME OF BUSINESS ENTITY			VALUE \$1,001-\$10,000
NATURE OF INTERESTS, E.G., COMMON STOCK, PAI	RTNERSHIP INTEREST, ET	c.	\$10,001-\$100,000
			☐ Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED DISPOSED	DATE	OWNERSHIP Less than 10% INTEREST * 10% or greater
NAME OF BUSINESS ENTITY			VALUE S1,001-\$10,000
NATURE OF INTERESTS, E.G., COMMON STOCK, PAI	ATNERSHIP INTEREST, ET	D	S10,001-\$100,000 Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED DISPOSED	DATE	OWNERSHIP Less than 10% INTEREST # 10% or greater
NAME OF BUSINESS ENTITY	100		VALUE \$1,001-\$10,000
NATURE OF INTERESTS, E.G., COMMON STOCK, PAI	S10,001-\$100,000 Over \$100,000		
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED DISPOSED	DATE	OWNERSHIP Less than 10% INTEREST * 10% or greater
NAME OF BUSINESS ENTITY	3.0.000		VALUE S1,001-\$10,000
			S10,001-\$100,000
NATURE OF INTERESTS, E.G., COMMON STOCK, PAI	RTNERSHIP INTEREST, ET	0.	Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED	DATE	CWNERSHIP Less than 10%
	DISPOSED		* 10% or greater
NAME OF BUSINESS ENTITY			VALUE \$1,001-\$10,000
NATURE OF INTERESTS, E.G., COMMON STOCK, PAI	RTNERSHIP INTEREST, ETC	3 .	☐ \$10,001-\$100,000 ☐ Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED	I DATE	OWNERSHIP Less than 10%
	DISPOSED	1	INTEREST * 10% or greater
NAME OF BUSINESS ENTITY			VALUE S1,001-\$10,000
NATURE OF INTERESTS, E.G., COMMON STOCK, PAI	RTNERSHIP INTEREST, ETC	2.	S10,001-\$100,000 Over \$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	I 🗆	1	OWNERSHIP Less than 10%
Sales and State	ACQUIRED	DATE	INTEREST * 10% or greater
	DISPOSED		- Close or Alegrat

See Attached Instructions

Attach additional information on appropriately labeled continuation sheets.

^{*} If you have checked this box, you may have to report your pro rata share of the gross income to, or the interests in real property and investments held by, the business entity on Schedules C, D or H. Note: You must report any salary, commission, distribution or other income paid to you or your spouse by the business entity on Schedule D, whether or not you have a 10% ownership interest.

ame _		0.000		1

Schedule B-Interests in Real Property

You must report interests in real property located in your jurisdiction, in which you and your immediate family had an aggregate interest of more than \$1,000 during the reporting period. You do not have to report your principal place of residence.

STREET ADDRESS O	R PRECISE LOCATION OF PROPERTY		-	
STREET ADDRESS O	THEORE LOCATION OF PHOPERTY	Value		\$1,001-\$10,000
NATURE OF INTERES	T FO TOUR COMM			\$10,001-\$100,000
NATURE OF INTERES	ST, E.G., EQUITY, OPTION			Over \$100,000
ACQUIRED	DATE	If Rental Property, Ownership Interest is		Less than 10%
DISPOSED		in the state of th	* 🗆	10% or greater
TREET ADDRESS O	R PRECISE LOCATION OF PROPERTY	Value		\$1,001-\$10,000
				\$10,001-\$100.000
NATURE OF INTERES	T, E.G., EQUITY, OPTION		ō	Over \$100,000
ACQUIRED	DATE	WB		Less than 10%
DISPOSED		If Rental Property, Ownership Interest is	* 🗆	10% or greater
STREET ADDRESS OF	R PRECISE LOCATION OF PROPERTY	Value		\$1,001-\$10,000
at an area of the		Value	-	\$10,001-\$100,000
NATURE OF INTERES	T, E.G., EQUITY, OPTION		1	
			ш	Over \$100,000
ACQUIRED	DATE	If Rental Property, Ownership Interest is		Less than 10%
DISPOSED		mriental rioperty, ownership interest is	* 🗆	10% or greater
TREET ADDRESS OF	R PRECISE LOCATION OF PROPERTY	Value		\$1,001-\$10,000
			П	\$10,001-\$100,000
NATURE OF INTERES	T, E.G., EQUITY, OPTION		П	Over \$100,000
			-	0461 \$100,000
ACQUIRED	DATE	If Rental Property, Ownership Interest is		Less than 10%
DISPOSED			* 🗆	10% or greater
STREET ADDRESS OF	R PRECISE LOCATION OF PROPERTY	Value		\$1,001-\$10,000
		Binta ninaka pikakana katawa		\$10,001-\$100,000
NATURE OF INTERES	T. E.G., EQUITY, OPTION			Over \$100,000
7				
ACQUIRED	DATE	If Rental Property, Ownership Interest is		Less than 10%
DISPOSED			*	10% or greater
THEET ADDRESS OF	R PRECISE LOCATION OF PROPERTY	Value		\$1,001-\$10,000
ATURE OF MITERES	T. E.G., EQUITY, OPTION			\$10,001-\$100,000
MIGHE OF INTERES	r. E.G., EQUITY, OPTION			Over \$100,000
ACQUIRED	DATE	If Rental Property, Ownership Interest is		Less than 10%
DISPOSED		in Helital Property, Ownership Interest is	* [10% or greater
				re of the Michigal

^{*} 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 your pro rata share of the gross rental paid by any individual tenant (if \$10,000 or more) on Schedule H.

Jama			
101110	 	 _	

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

During the reporting period did you or your immediate family have a 10% or greater interest in a business entity or in a trust?

No —You do not have to complete this schedule.

Yes—Continue reading below.

If yes, does the business entity or trust hold interests in real property or investments?

No -You do not have to complete this schedule.

Yes—You must report such interests in real property or investments owned by the business entity or trust if:

- Your pro rata share in any interest in real property is more than \$1,000 and the real property is located in your jurisdiction (report this on Schedule C-1 below); or
- b) Your pro rata share of any investment is more than \$1,000 and the investment is in a business entity located in, or doing business in, your jurisdiction (report this on Schedule C-2 on reverse).

This reporting requirement applies regardless of where your business entity is located or doing business.

Schedule C-1 Interests in Real Property

Name of Business Enti	ty or Trust Holding Interests in Real Property		
STREET ADDRESS O	PRECISE LOCATION OF PROPERTY	Value	\$1,001-\$10,000
NATURE OF INTERES	ST, E.G., EQUITY, OPTION		\$10,001-\$100,000
ACQUIRED DISPOSED	DATE		Over \$100,000
STREET ADDRESS C	OR PRECISE LOCATION OF PROPERTY	Value	\$1,001-\$10,000
NATURE OF INTERE	ST, E.G., EQUITY, OPTION		\$10,001-\$100,000
ACQUIRED DISPOSED	DATE		Over \$100,000
STREET ADDRESS C	OR PRECISE LOCATION OF PROPERTY	Value	\$1,001-\$10,000
NATURE OF INTERE	ST, E.G., EQUITY, OPTION		\$10,001-\$100,000
ACQUIRED DISPOSED	DATE		Over \$100,000
STREET ADDRESS (OR PRECISE LOCATION OF PROPERTY	Value	\$1,001-\$10,000
NATURE OF INTERE	ST. E.G., EQUITY, OPTION		\$10,001-\$100,000
ACQUIRED DISPOSED	DATE		Over \$100,000

See Attached Instructions and Schedule C-2 on Reverse

Schedule C-2 Investments

Contract of the Contract of th				
NAME OF BUSINESS ENTITY	Value	\$1,001-\$10,000		
NATURE OF INVESTMENT, E.G., COMMON STOCK, P				
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED DISPOSED	DATE		\$10,001-\$100,000 Over \$100,000
IAME OF BUSINESS ENTITY	T DISPOSED			Over \$ 100,000
			Value	\$1,001-\$10,000
ATURE OF INVESTMENT, E.G., COMMON STOCK, P	ARTNERSHIP INTEREST, E	TC.		
				\$10,001-\$100,000
SENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED	DATE	1	
	DISPOSED	The state of the s		Over \$100,000
AME OF BUSINESS ENTITY				
ATURE OF INVESTMENT, E.G., COMMON STOCK, P.	ARTNERSHIP INTEREST E	TC	Value	\$1,001-\$10,000
			No.	\$10,001-\$100,000
SENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED	DATE		
	DISPOSED	OMIC .		Over \$100,000
AME OF BUSINESS ENTITY				
	Value	\$1,001-\$10,000		
ATURE OF INVESTMENT, E.G., COMMON STOCK, P.	ARTNERSHIP INTEREST. E	TC.		
TUTAL OFFICE OF A CHIEF OF A CHIE	18			\$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED	DATE		П.
NAME OF BUSINESS ENTITY	DISPOSED			Over \$100,000
white or addiness entity			Value	T
NATURE OF INVESTMENT, E.G., COMMON STOCK, P.	ARTNERSHIP INTEREST. E	TC.	Value	\$1,001-\$10,000
				\$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED	DATE	THE RESERVE	
	DISPOSED			Over \$100,000
IAME OF BUSINESS ENTITY			/ 7 1/ / 5	
			Value	\$1,001-\$10,000
NATURE OF INVESTMENT, E.G., COMMON STOCK, P.	ARTHERSHIP INTEREST, E	TC.		
				\$10,001-\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED	DATE		
IAME OF BUSINESS ENTITY	DISPOSED			Over \$100,000
MANC OF BUSINESS ENTITY				
ATURE OF INVESTMENT, E.G., COMMON STOCK, PA	ARTNERSHIP INTEREST F	TC	Value	\$1,001-\$10,000
				\$10,001-\$100,000
ENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED	DATE	The state of the s	310,001-3100,000
	DISPOSED			Over \$100,000
AME OF BUSINESS ENTITY				0101010000
			Value	\$1,001-\$10,000
ATURE OF INVESTMENT, E.G., COMMON STOCK, PA	ARTNERSHIP INTEREST, E	TC.		
				\$10,001-\$100,000
ENERAL DESCRIPTION OF BUSINESS ACTIVITY	ACQUIRED	DATE		
	DISPOSED		308 B	Over \$100,000

See Attached Instructions

Attach additional information on appropriately labeled continuation sheets.

Mana	
Name	

Schedule D-Income (other than Gifts and Loans)

You must report your gross income (other than gifts and loans) and your community property interest in your spouse's gross income. Income includes all payments aggregating \$250 or more received from any source located in, or doing business in, your jurisdiction. Salary, commissions and other payments should be listed on this schedule. You do not have to report salary (including per diem) from federal, state and local government agencies. (See attached instructions for other types of income which are not reportable).

(BESTERNA)		
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

See Attached Instructions

Attach additional information on appropriately labeled continuation sheets.

Name			

Schedule E-Loans

You must report loans aggregating \$250 or more which were received or were outstanding during the reporting period from any source located in, or doing business in, your jurisdiction. Loans from family members do not have to be reported. (Report loans to business entities on Schedule H.)

NAME OF LENDER			m	
ADDRESS OF LENDER			Amount of L	\$250-\$1,000
			Highest Balance	
BUSINESS ACTIVITY OF LENDER			- January	\$1,001-\$10,000
SECURITY FOR LOAN			INTEREST CATE	Over \$10,000
Section 1 to the contract of t	NONE	ENTIRE LOAN	INTEREST RATE	☐ NONE
NAME OF LENDER		REPAID L		- HONE
NAME OF LENDER				
ADDRESS OF LENDER			Amount of	\$250-\$1,000
ADDRESS OF LENDER			Highest	
DUCKERO LOTHING TO THE PROPERTY OF THE PROPERT			Balance	\$1,001-\$10,000
BUSINESS ACTIVITY OF LENDER				
				Over \$10,000
SECURITY FOR LOAN	☐ NONE	ENTIRE LOAN	INTEREST RATE	
数据数据的 机自由用。以至4万月	U WONE	REPAID		NONE
NAME OF LENDER				
			Amount of	\$250-\$1,000
ADDRESS OF LENDER			Highest	
			Balance	\$1,001-\$10,000
BUSINESS ACTIVITY OF LENDER				
				Over \$10,000
SECURITY FOR LOAN		THE LALL	INTEREST RATE	0461.3.10,000
	NONE	REPAID		☐ NONE
NAME OF LENDER		700		
ADDRESS OF LENDER	No. 1992 Control of the Control		Amount of Highest	\$250-\$1,000
			Balance	
BUSINESS ACTIVITY OF LENDER				\$1,001-\$10,000
SECURITY FOR LOAN				Over \$10,000
	NONE	ENTIRE LOAN	INTEREST RATE	☐ NONE
NAME OF LENDER		REPAID		L NONE
THE OF LENDER				
ADDRESS OF LENDER			Amount of	\$250-\$1,000
ADDRESS OF CENDER			Highest	
DUDNIEGO LOTRUTY OF LENGTH			Balance	\$1,001-\$10,000
BUSINESS ACTIVITY OF LENDER				
				Over \$10,000
SECURITY FOR LOAN	☐ NONE	ENTIRE LOAN	INTEREST RATE	
		REPAID \square		NONE
NAME OF LENDER				
			Amount of	\$250-\$1,000
ADDRESS OF LENDER			Highest	
the Manual Control of the State			Balance	\$1,001-\$10,000
BUSINESS ACTIVITY OF LENDER				-1,001-310,000
				Over \$10,000
SECURITY FOR LOAN		SMTIDE LOAD	INTEREST RATE	Over \$10,000
	NONE	ENTIRE LOAN REPAID		☐ NONE
	AND DESCRIPTION OF THE PARTY OF		the state of the s	The same of the sa

Name	
	 -

Schedule F-Gifts

You must report all gifts received during the reporting period aggregating \$50 or more from any source. Gifts from family members do not have to be reported.

AME OF DONOR	DATE(S) OF GIFT(S)
DDRESS OF DONOR	VALUE OF GIFT(S)
USINESS ACTIVITY OF DONOR, IF ANY	DESCRIPTION OF GIFT(S)
AME OF DONOR	DATE(S) OF GIFT(S)
DDRESS OF DONOR	VALUE OF GIFT(S)
USINESS ACTIVITY OF DONOR, IF ANY	DESCRIPTION OF GIFT(S)
IAME OF DONOR	OATE(S) OF GIFT(S)
ADDRESS OF DONOR	VALUE OF GIFT(S)
SUSINESS 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)

Name.			1010

Schedule G-Honoraria

You must report payments received during the reporting period aggregating \$50 or more from any source, received for speaking at an event, participating in a panel, leading a seminar, or providing similar services.

NAME OF SOURCE	
NAME OF SOURCE	DATE(S) OF PAYMENT(S)
ADDRESS	AMOUNT OR VALUE OF PAYMENT(S)
BUSINESS ACTIVITY, IF ANY, OF SOURCE	SPECIFIC DESCRIPTION OF SERVICES RENDERED
NAME OF SOURCE	DATE(S) OF PAYMENT(S)
ADDRESS	AMOUNT OR VALUE OF PAYMENT(S)
BUSINESS ACTIVITY, IF ANY, OF SOURCE	SPECIFIC DESCRIPTION OF SERVICES RENDERED
NAME OF SOURCE	DATE(S) OF PAYMENT(S)
ADDRESS	AMOUNT OR VALUE OF PAYMENT(S)
BUSINESS ACTIVITY, IF ANY, OF SOURCE	SPECIFIC DESCRIPTION OF SERVICES RENDERED
NAME OF SOURCE	DATE(S) OF PAYMENT(S)
ADDRESS	AMOUNT OR VALUE OF PAYMENT(S)
BUSINESS ACTIVITY, IF ANY, OF SOURCE	SPECIFIC DESCRIPTION OF SERVICES RENDERED
NAME OF SOURCE	DATE(S) OF PAYMENT(S)
ADDRESS	AMOUNT OR VALUE OF PAYMENT(S)
BUSINESS ACTIVITY, IF ANY, OF SOURCE	SPECIFIC DESCRIPTION OF SERVICES RENDERED
NAME OF SOURCE	DATE(S) OF PAYMENT(S)
ADDRESS	AMOUNT OR VALUE OF PAYMENT(S)
BUSINESS ACTIVITY, IF ANY, OF SOURCE	SPECIFIC DESCRIPTION OF SERVICES RENDERED

Name		_

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

	reporting period did you and your spouse ov uding rental property)?	wn an aggregate interest of 10% or more in any business
	No —You do not need to complete this sch Yes—You must list the name of each indivi	
	Is located in, or doing business in, your juris	sdiction; and
	Made payments, including loans, to your bu	usiness entity during the reporting period; if
	Your pro rata share of the gross amount of munity property interest in your spouse's si	
This reno	rting requirement applies regardless of wh	ere your business entity is located or doing business.
Tina Topol	rulig requirement applies regardless of wil	or you business only is totaled or doing business.
Note: If	your pro rata share of gross payments from a	n individual or business entity was \$250 or more, the dis-
	on provisions of the Political Reform Act are	
NAME OF BU	SINESS ENTITY	ADDRESS OF BUSINESS ENTITY
DESCRIPTION	OF BUSINESS ACTIVITY OF BUSINESS ENTITY	
NAMES OF S	COURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY	
0.0 / 100.0		
The same		

GENERAL INFORMATION FOR COMPLETING INSTRUCTIONS

For additional information, see the Instruction Manual for Statement of Economic Interests—Form 721, and the Fair Political Practices Commission's Guide to the Political Reform Act: California's Conflict of Interest Law for Public Officials, which explains what a conflict of interest is and when disqualification is required by law.

SCHEDULE A-Investments

Your "immediate family" means yourself, your spouse, and your dependent children.

An "Investment" is any financial interest in a business entity. The most common kinds of investments are corporate stocks and bonds, interests in partnerships, and sole proprietorships. You do not have to report investments in bank accounts, insurance policies, government bonds, interests in diversified mutual funds registered with the S.E.C. under the Investment Act of 1940, or interests in common trust funds created pursuant to Section 1564 of the Financial Code. If you are a beneficiary or maker of a trust, consult the detailed Instruction Manual or your filing official.

A business entity is in the jurisdiction if it or a related business entity:

- · Is located or resides in the jurisdiction.
- · Does business 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.

SCHEDULE B-Interests in Real Property

"Interests in real property" include ownership interests, options to purchase, and leasehold interests if ten years or more remain on the lease. The value of a leasehold interest is the total amount of rent owed by you during the reporting period. An interest in real property is not reportable if it is your principal place of residence. However, if your principal place of residence also is a place of business, e.g., a family farm or retail business, you are required to disclose that portion of the property which is used in connection with your business activities.

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

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

To determine your "pro rata share" of an interest in real property or investment held by a business entity, multiply the value of the interest or investment by the percentage of the business entity owned by you and your immediate family.

You must provide the same information for any interest in real property or investment listed on this schedule that is required for any investment or interest in real property listed on Schedule A or B. If you are a beneficiary or maker of a trust, consult the detailed instruction Manual or your filing official.

SCHEDULE D—Income (Other than Loans and Gifts)

The most common forms of income are salary, wages, income from a business entity and proceeds from sales, including the sale of a house or car. Income includes your community property share of your spouse's income.

You do not have to report salary and reimbursement for expenses or per diem received from a state, local or federal government agency; dividends, interest or other returns on a security registered with the S.E.C.; campaign contributions; payments under an insurance policy; interest on bank accounts or bonds; income of dependent children; alimony or child support payments; redemption of mutual funds; bequests or inheritance; or any payments received under a defined benefit pension plan qualified under Internal Revenue Code Section 401(a). If you or your spouse is a beneficiary or maker of a trust, consult the detailed Instruction Manual or your filing official.

If you and your immediate family own an aggregate interest of 10% or more in a business entity, or in rental property, you must report your pro rata share of the total gross income to the business entity, or the total gross rentals on the rental property, on this schedule. In computing your pro rata share, include your community property interest in your spouse's share of total gross income or total gross rentals.

You must report any salary, commission, distribution or other payment to you or your spouse from any business entity, whether or not you have a 10% ownership interest in the entity.

Income to a business entity should be reported on Schedule H.

Loans and gifts are also income, and should be reported on Schedules E and F.

SCHEDULE E-LOANS

You must report all loans (including your community property interest in loans to your spouse) which were received or outstanding during the reporting period at the highest amount owed during the reporting period. You do not have to report loans from commercial lenders made in the ordinary course of business on terms available to the public without regard to the borrower's official status if the loans:

- Were used to purchase your principal place of residence; or
- (2) Aggregate less than \$10,000 from any one lender, including indebtedness arising from retail installment or credit transactions.

You do not have to report loans from family members.

SCHEDULE F-Gifts

You do not have to report gifts of food, drink or lodging provided in another individual's home; gifts approximately equal in value exchanges between you and an individual, other than a lobbyist, on holidays, birthdays, or similar occasions; gifts of informational materials, such as books, pamphlets, reports, calendars or periodicals; gifts from family members; gifts which are not used and within thirty days are returned to the donor or delivered to a charitable organization without being claimed by you as a charitable contribution for tax purposes; or any bequest or inheritance.

You must report all other gifts aggregating \$50 or more received from any individual or entity during the reporting period, whether or not the donor resides in, is located in, or is doing business within the jurisdiction.

SCHEDULE G-Honoraria

"Honorarium" means a payment for speaking at any event, participating in a panel or seminar, or engaging in any similar activity. You do not need to report free admission, food, beverages and similar nominal benefits provided to you at an event at which you speak, participate in a panel or seminar, or perform a similar service. Reimbursement or advance for actual intrastate travel and for necessary accommodations provided directly in connection with the event are not payments and need not be reported by you.

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

FPPC Regulation 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 18740 by contacting the Fair Political Practices Commission.

INFORMATIONAL DOCUMENTS FOLLOW

SAN DIEGO COUNTY

3 RD SUPERV

SUPERVISORIAL DISTRICT

OFFICE OF THE REGISTRAR OF VOTERS



- 1. Cornish Dr.
- 2. Santa Fe Dr.
- 3. Balour Dr.
- 4. Encinitas Blvd.
- 5. Manchester Ave.
- 6. San Elijo Lagoon
- 7. El Camino Real
- 8. Via de la Valle
- 9. Whispering Palms
 Sanitation Dist.
- 10. San Dieguito River
- 11. Lake Hodges
- 12. Hwy 15
- 13. Highland Valley Rd.
- 14. Eastern Boundary of City of San Diego
- 15. Pomerado Rd.
- 16. Beeler Canyon Rd.
- 17. Sycamore Canyon Rd.
- 18. San Diego City Limits
- 19. Unnamed Access Rd. to Sanitary Fill
- 20. Father Junipero Serra Trail
- 21. San Diego City Limits
- 22. Hwy 8
- 23. Mission Gorge Rd.
- 24. Friars 'Rd.
- 25. Hwy 15
- 26. Aero Dr.
- 27. Linda Vista Rd.
- 28. Mesa College, extended
- 29. Mt. Acadia
- 30. Clairemont Dr.
- 31. Hwy 5
- 32. San Diego River Channel

SCHEDULE FOR APPOINTMENT PROCEDURE

DATE TIME DAY 1. FILE APPLICATION DOCUMENTS Application Statement of) By) 5:00 p.m. Tuesday May 31, 1983 Qualifications Statement of Reasons Statements of Economic) Interests (Form 721)) 10:00 a.m. Friday June 3, 1983 2. FIRST PUBLIC HEARING 2:00 p.m. Wednesday June 8, 1983 3. SECOND PUBLIC HEARING

AT FIRST PUBLIC HEARING applicants will be allowed 3 minutes to make a presentation to the Board in support of candidacy for appointment. Before the conclusion of this hearing the Board shall select five (5) applicants to appear at the second public hearing.

AT SECOND PUBLIC HEARING each applicant shall be allowed 10 minutes for a presentation and shall be expected to answer questions concerning applicant's candidacy, including, but not limited to, the areas of the applicant's background, philosophy of government, reasons for seeking appointment, and opinions on relevant issues. Members of the public in attendance may also submit written questions to the Board which may be asked of any applicant.

ADDITIONAL MATERIAL such as a resume or written responses to various questions may be requested by the Board. The Clerk shall advise each applicant of any such requests and due dates for responses.

Forter D. Cremans

Clerk of the Board of Supervisors Room 402 County Administration Center 1600 Pacific Highway San Diego, CA 92101 San Diego County Charter Section 401.4 provides for the filling of a vacancy in the office of the Board of Supervisors as follows:

"Section 401.4: A vacancy or vacancies in the office of supervisor are filled in one of the following ways, as determined by the remaining members of the Board:

- "1. By appointment by the remaining members of the Board for the unexpired term.
- "2. By appointment by the remaining members of the Board until the qualification of a successor elected at a special election called by the remaining members of the Board.
- "3. By election at a special election called by the remaining members of the Board.

If a vacancy is to be filled by special election the special election must be called by the remaining members of the Board within 45 days of the vacancy. A special election to fill a vacancy in the office of supervisor shall consist of a special primary election and if necessary, a special general election. A special primary election shall be held in the supervisorial district in which the vacancy occurred on a Tuesday, at least 56 days, but not more the [sic] 63 days, following the adoption of the resolution calling the special election, except that any such special primary election may be conducted within 180 days following the adoption of such resolution in order that the special primary election or special general election may be consolidated with the next regularly scheduled statewide election.

"Candidates at the special primary election shall be nominated in the manmner set forth in the Elections Code for the nomination of candidates for a nonpartisan office for a direct primary election, except that nomination papers shall not be circulated prior to the adoption of the resolution calling the special election and shall be filed with the Registrar of Voters for examination not less than 39 days before the special primary election.

"If only one candidate qualifies for the special primary election, that candidate shall be appointed to the vacancy by the remaining members of the Board for the unexpired term, shall serve exactly as if elected to San Diego County Charter Section 401.4 (cont.)

such vacancy, and no special primary election or special general election to fill the vacancy shall be held. A candidate who receives a majority of all votes in the special primary election is elected to fill the vacancy for the unexpired term, and no special general election shall be held. In the event there are no more than two candidates for a vacancy, the office shall be voted upon at the special primary election, and no special general election shall be held.

"When no candidate receives a majority of all votes in the special primary election, a special general election shall be held on the fourth Tuesday after the special primary election. The two candidates who received the highest number of votes in the special primary election shall be the candidates in the special general election, and the one who receives the higher number of votes in the special general election is elected to fill the vacancy for the unexpired term.

"In a special election to fill a vacancy in the office of supervisor, the Board may authorize either the special primary election or the special general election, or both, to be conducted wholly by mail, provided that the special primary election or the special general election to be conducted by mail does not occur on the same date as the statewide election with which it has been consolidated. In no event may a special primary election or a special general election be conducted on the day after a state holiday."

COUNTY OF SAN DIEGO, CALIFORNIA BOARD OF SUPERVISORS POLICY

SUBJECT Process to Fill Vacancies on the	POLICY	PAGE
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Purpose

Establish a procedure for appointment of Supervisors to fill vacancies on the Board of Supervisors which provides maximum citizen participation.

Background

In November 1982, voters approved changes to the County Charter which removed the power of the Governor to appoint a successor to fill a vacancy on the Board of Supervisors if the Board failed to do so. The new charter (Sec. 401.4) allows the Board of Supervisors to fill vacancies on the Board by appointment, by calling for a special election, or by a combination of the two. Since the adoption of the earlier policy regarding the appointment process in 1975, State law has been enacted prohibiting the Board from voting in executive session to fill a vacancy in an elective position.

Policy

It is the policy of the Board of Supervisors that:

When a vacancy occurs on the Board of Supervisors the following procedures shall be followed to fill that vacancy:

- 1. Within seven days of a vacancy on the Board of Supervisors the Board shall meet to determine the method by which it shall fill the vacancy. At that meeting, the Registrar of Voters shall provide to the Board a report on the costs to hold a special election, a proposed schedule and a determination of the possibility of consolidating the special election with any other local or statewide election. If the Board decides to fill the vacancy by appointment, the Board shall, at that meeting, approve the deadline for acceptance of applications and determine dates for two public hearings and adopt any additional procedures governing the appointment process.
- 2. The deadline for filing of applications shall be no sooner than seven but no later than 10 days from the date of the meeting where the Board has determined to fill the vacancy by appointment. Applications will be obtained and filed at the Office of the Clerk of the Board of Supervisors. All applicants must personally appear to obtain and file the required application forms. All applicants shall be required to provide to the Board by the filing deadline (1) a statement of qualifications; (2) affidavit of applications for

COUNTY OF SAN DIEGO, CALIFORNIA BOARD OF SUPERVISORS POLICY

SUBJECT	SUBJECT Process to Fill Vacancies on the	POLICY NUMBER	PAGE
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appointment certifying, under the penalty of perjury that the applicant is a California citizen, over the age of 18, is not disqualified from holding office because of conviction of crimes, and fulfills the residency and elector requirements established by the County Charter for a resident of the Supervisorial district in which the vacancy exists.

The application form will include the following:

- a. Full name, residence address for the past five years.
- b. Employer and occupation for previous five years.
- c. Date and place of birth.
- d. A written statement outlining qualifications for office (500 word maximum).
- e. A written statement explaining the applicant's reasons for wishing to be a Supervisor (500 word maximum).
- f. A statement of Economic Interests form of the type required to be filed by County Supervisors.

The Clerk of the Board shall provide to each applicant copies of any pertinent State law, County ordinance or policy relating to the vacancy.

Applicants may be requested to provide the Board with additional information, including answers to questions submitted by members of the Board of Supervisors.

- 4. The Clerk of the Board will make copies of all completed application forms at the close of each business day during the filing period. These will be consolidated into a packet, three (3) copies of which shall be distributed to each Supervisor the morning of the next business day for their review. Theses packets will also be made available to the media.
- 5. The first hearing on all applicants shall be held no sooner than the day after the filing deadline and no later than seven days after filing deadline. Each applicant shall be given three minutes to make an oral presentation to the Board. After all applicants have made their presentation to the Board, the Chair shall allow each Supervisor to ask questions to any applicant.

After presentation and question period have been concluded, the Board shall, on written ballots provided by the Clerk of the Board select no more than five (5) finalists from among those who have applied.

COUNTY OF SAN DIEGO, CALIFORNIA BOARD OF SUPERVISORS POLICY

SUBJECT	Process to Fill Vacancies on the Board of Supervisors	POLICY NUMBER	PAGE
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Each Supervisor may vote for up to five (5) applicants. The Clerk shall announce the results, itemizing each Supervisor's vote. The five applicants receiving the largest number of votes will be chosen as finalists. Any ties will be broken by subsequent vote among only the applicants tied for a remaining finalist(s) position(s). The Clerk shall announce the votes of each Board member after each round of balloting.

Supervisors may also require each finalist to provide the Board with a medical certification, statement of economic interest, permission to conduct credit and police checks and written responses to any questions of any applicant.

6. The second hearing shall be held not less than three days following the first hearing. Each finalist shall have ten (10) minutes to make oral presentations.

After applicant presentations, the Chair shall allow each Board member to ask questions of the applicants. At the conclusion of the question period, the Board shall, on written ballots provided by the Clerk of the Board, vote for one of the finalists to fill the unexpired term. Balloting shall continue at this or subsequent meetings. The Clerk shall announce the vote of each Board member after each round of balloting.

Whenever any applicant receives three (3) or more votes, the Chairman shall declare that three (3) members of the Board have concurred in the selection of such applicant and that such applicant shall be declared by the Chair to be appointed to the Office of Supervisor. The person so appointed shall be prepared to formally assume the office not later than three (3) business days following the selection by the Board of Supervisors.

PROCEDURES ADOPTED TO IMPLEMENT BOARD POLICY A-39 IN FILLING A VACANCY IN THE OFFICE OF SUPERVISOR - THIRD DISTRICT

1. Time for Obtaining and Filing Applications

Applications will be available at the office of 'the Clerk of the Board of Supervisors, Room 402, 1600 Pacific Highway, San Diego, California 92101, at 8:00 a.m. on May 25, 1983 and must be obtained personally by each applicant.

The Clerk of the Board of Supervisors will accept applications for appointment to the office of Supervisor, Third District, during the period beginning 8:00 a.m., Wednesday, May 25, 1983, and ending at 5:00 p.m., Tuesday, May 31, 1983. All applications must be filed personally by the applicant at the Clerk's office. The Clerk of the Board will post and publish (in a newspaper of general circulation) a notice of the vacancy, the dates for filing applications and the qualifications required of applicants.

2. Qualifications Required of Applicants

In accord with County Counsel's ruling, applicants must meet certain qualifications to be considered for appointment:

- a. must be at least 18 years of age.
- b. must be a California citizen at time of appointment.
- c. must not have been convicted of crimes which disqualify a person from holding public office.
- d. must have been a registered voter of the Third Supervisorial District for 30 days immediately preceding the close of the application period (May 31, 1983).

The Registrar of Voters will only certify the voter registration of the applicants as specified above.

Contents of the Application

In addition to certifying the above requirements listed by County Counsel, the application form will include the following:

- a. Full name, residence address for the past five years, and age.
- b. Employer and occupation for previous five (5) years.

- c. Date and place of birth.
- d. A written statement outlining qualifications for office (500-word maximum).
- e. A written statement explaining the applicant's reasons for wishing to be a Supervisor (500-word maximum).

The applicants will also be required to complete a Statements of Economic Interests form (Form 721) of the type required of County Supervisors, and to return it with their completed application forms by 5:00 p.m., May 31, 1983. Applicants may be asked to respond to questions submitted to them by members of the Board of Supervisors.

4. Distribution of Completed Forms to Supervisors

The Clerk of the Board will make copies of all completed application forms at the close of each business day during the filing period. These will be consolidated into a packet, three (3) copies of which will be distributed to each of the remaining Supervisors the morning of the next business day for their review.

These packets will also be made available to the press.

5. First Board Meeting: Selection of Finalists

On Friday, June 3, having reviewed the completed application forms, the Board will meet at 10:00 a.m. and select five finalists for further review. Board of Supervisors Policy A-39 will govern public participation.

Each Supervisor may vote for up to five applicants, by written ballot distributed by the Clerk of the Board of Supervisors. The Clerk will announce the results, itemizing each Supervisor's votes. The five applicants receiving the highest nubmer of votes will be chosen as finalists. Any ties will be broken by a subsequent vote among only the applicants tied for remaining finalist position(s).

6. Second Meeting: Possible Selection of a Supervisor

On Wednesday, June 8, 1983, at 2:00 p.m., the Board of Supervisors will hold a second meeting. At this time finalists will make brief presentations (maximum of ten minutes) to the Board and answer questions from Board members.

Following the close of questions and answers, the Clerk of the Board of Supervisors will distribute a written ballot to each Supervisor, listing alphabetically the five finalists for appointment. Supervisors may then vote for one applicant among the five finalists. The Clerk of the Board of Supervisors will collect the ballots and announce the results, listing each Supervisor's vote.

Whenever any applicant receives three (3) or more votes, the Chairman shall declare that three members of the Board have concurred in the selection of such applicant and that such applicant shall be declared by the Chairman to be appointed to the Office of Supervisor, Third District. The person so appointed shall be prepared to formally assume the office not later than three business days following the selection by the Board of Supervisors.

Should no finalist receive a majority vote in the initial balloting, the Chairman may schedule another meeting for continued deliberations.

LIST OF DISQUALIFYING CRIMES

Cal.Const.; art. 9, § 8(a) [having given or offered a bribe to procure personal election or appointment];

Cal.Const., art. 9, § 8(b) [bribery, perjury, forgery, malfeasance in office, and other high crimes];

Cal.Const., art. 4, § 18, and Gov. Code, § 3035 [impeachment];

Gov. Code, § 1090-1097 [officer being financially interested in contacts made in official capacity];

Gov. Code, § 9412 [legislator in contempt of the legislature];

Pen. Code, § 68 [asking or receiving bribes for a vote or action on a matter to be brought before a person in his official capacity];

Pen. Code, § 74 [appointing another person to a public office, or permitting another person to exercise or discharge any of the duties of his office for a gratuity or reward];

Pen. Code, \$\$ 85 and 88 [a member of the legislature bribing another member of the legislasture];

Pen. Code, §§ 86 and 88 [a member of the legislature asking, receiving or agreeing to receive a bribe];

Pen. Code, § 165 [giving or offering a bribe to a member of a board of supervisors, a board of trustees or a common council of a county, city and county or city, and every member of such a body who receives, offers or agrees to receive a bribe];

Pen. Code. §§ 228 and 232 [dueling with deadly weapons, sending or accepting a challenge for a duel or acting as a second]; and

Pen. Code, § 424 [embezzlement, falsification of accounts, misappropriation, unauthorized loans, and failure to pay over or transfer public monies by public officers].

Copies of the above constitutional and statutory provisions may be obtained at the County Law Library, 1105 Front Street, San Diego, California 92101.

1982-83 MANUAL

FOR STATEMENTS OF ECONOMIC INTERESTS FORM 721

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

A CANDIDATE'S STATEMENT

AN ASSUMING OFFICE STATEMENT

AN ANNUAL STATEMENT

A LEAVING OFFICE STATEMENT

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Fair Political Practices Commission

P.O. Box 807 Sacramento, California 95804

Phone: (916) 322-6444

WHAT IS A STATEMENT OF ECONOMIC INTERESTS?

A Statement of Economic Interests is a form on which you, as a candidate or officeholder, disclose certai financial interests. The Statement is available for inspection by the public.

WHO MUST FILE STATEMENTS?

You must file a Statement if you are seeking, holding or leaving any of the following offices:

State Officers-Governor

Lieutenant Governor Attorney General Controller

Secretary of State

Treasurer

Superintendent of Public Instruction

Members of the Legislature

Members of the State Board of Equalization Members of the Public Utilities Commission

Members of the State Energy Resources Conservation and Development Commission

Members of the State Coastal Commission

Members of the Fair Political Practices Commission

Judges—Judges of a court of record (Supreme, Appellate, Superior and Municipal)

County Officers-Members of the Board of Supervisors

Chief Administrative Officers

District Attorneys

Planning Commissioners

City Officers-Mayors

Members of the City Council

City Managers

Chief Administrative Officers Planning Commissioners

WHY MUST A STATEMENT OF ECONOMIC INTERESTS BE FILED?

The Political Reform Act is intended to prevent conflicts of interests by requiring public officials such a yourself to disclose financial interests which could foreseeably cause conflicts. In addition, as a public official you may be required to disqualify yourself from making, participating in, or attempting to influence any gover mental decision which will affect your financial interests, including those you are required to report on your Stat ment of Economic Interests. The Fair Political Practices Commission's Guide to the Political Reform Ac California's Conflict of Interest Law for Public Officials explains what a conflict is, and when disqualification is r quired by law.

WHEN MUST STATEMENTS BE FILED?

Candidate's Statement: File no later than the final filing date of your declaration of candidacy.

Assuming Office Statement:

If you are a:

Newly-elected officeholder: File within 30 days after your term begins.

—Exception: If you are a newly-elected state officer who was a non-incumbent candidate, and if you assumed office in December or January, you do not file an assuming office Statement. Instead, you must file an annual Statement covering the period from the day after you filed your candidate's Statement, through December 31.

Example: If you are a newly-elected state officer who assumed office January 3, 1983, you do not file an assuming office Statement. Instead, you file an annual Statement by the March 1, 1983, filing deadline for state officers. This annual Statement will cover a period from the day after you filed your candidate's Statement, through December 31, 1982.

Newly-appointed officeholder: File within 10 days after the date you take office, unless subject to confirmation by the Commission on Judicial Appointments or State Senate, in which case you must file within 10 days after appointment or nomination.

Annual Statements:

If you are a:

State Officer (as listed above): File any time after January 1, 1983, and no later than March 1, 1983.

Judge: File any time after January 1, 1983, and no later than March 1, 1983.

City and County Officer (as listed above): File any time after January 1, 1983, and no later than April 1, 1983.

Leaving Office Statement: File within 30 days after you leave office.

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

WHAT PERIOD DOES THE STATEMENT COVER?

You may be required to disclose your financial interests as of a specific date (such as the date you assumed office), or over a specific "reporting period" (such as a calendar year).

Candidate's Statement: On a candidate's Statement, you must report the interests you held on the date you filed your candidate's Statement (which must be no later than the final filing date of your declaration of candidacy).

Assuming Office Statement:

Newly-elected officeholder: On an assuming office Statement, you must report the interests you held on the date your term began.

Newly-appointed officeholder: On an assuming office Statement, you must report the interests you held on the date you assumed office, or the date you filed your Statement, whichever is earlier.

-	Exception: If your position is subject to confirmation, you report the interests you held on the date you filed your Statement, which must be within 10 days after your appointment or nomination.
nnua	I Statement:
	Newly-elected non-incumbent state officeholders who assumed office in December or January: On an annual Statement, you must report interests held during the period, which:
	—Begins on: —The day after you filed your candidate's Statement, and

-Ends on:

-December 31.

All other filers: On an annual Statement you must report interests held during the period, which:

-Begins on:

- -January 1, the day after the closing date* of a previous annual Statement, or
- -The day after the date of a previous assuming office Statement, whichever is later, and
- --Ends on:
 - -December 31.

Leaving Office Statement: On a leaving office Statement, you must report the interests you held during the period, which:

-Begins on:

- -January 1, the day after the closing date* of a previous annual Statement, or
- -The day after the date of a previous assuming office Statement, whichever is later, and
- -Ends on:
 - -The day that you leave office.

If you are filing your first annual Statement and fall into any of the situations described below, you should modify the "period covered" on the cover page of your Statement as indicated:

- -If you assumed office after January 1, 1982, draw a line through "January 1" and write in the date you assumed office.
- —If you filed an assuming office Statement before January 1, 1982, and have not filed a Statement since, you should draw a line through "January 1" and write in the date you assumed office.

^{*} The "closing date" is the last date during a period for which you must disclose. The closing date of an annual Statement in December 31.

Special Exceptions:

—If you assume office between October 1 and December 31, and filed an assuming office Statement, you do not need to file an annual Statement until one year following the date specified for filing annual Statements. If you choose to do this, the first annual Statement you file will cover a period longer than a calendar year and the period will begin on the day after your assuming office date. This exception is not available to newly-elected, non-incumbent state officers who assume office in December, as they do not file assuming office Statements.

Example: If you assumed office on December 15, 1982, and your annual filing deadline is April 1, you will not file an annual Statement for the April 1, 1983, deadline, but will wait until the 1984 deadline. The period covered by your annual Statement filed in 1984 will be December 16, 1982, through December 31, 1983.

- —If you leave office between January 1 and the filing deadline of your annual Statement, you may combine your leaving office Statement and your annual Statement. Check the boxes for both kinds of Statements, fill in the space for the date you leave office, and report the interests you held during the period, which:
 - -Begins on:
 - -January 1, the day after the closing date of your previous annual Statement, or
 - -The day after the date of your previous assuming office Statement, whichever is later, and
 - -Ends on:
 - -The date you leave office

If the filing date of your leaving office Statement (which must be within 30 days of the date you leave office) is later than the filing deadline of your annual Statement, you must inform your filing officer, in writing, before the annual filing deadline that you intend to follow this procedure. You may not use this procedure if the date you leave office is after your annual filing deadline:

Example: If you left office on February 16, 1983, and your filing deadline was April 1, 1983, you may combine your annual Statement and your leaving office Statement. This Statement will cover January 1, 1982 (the day after the closing date of your previous annual Statement), through February 16, 1983, your leaving office date. Your Statement would be due within 30 days of leaving office.

- —If you leave one of the offices listed above and assume another in the same jurisdiction on the same day, you are deemed not to have left office and assumed office and you do not have to file leaving office and assuming office Statements.
- —If you have filed either an assuming office or annual Statement within 60 days before filing your declaration of candidacy for another office in the same jurisdiction, you do not have to file a candidate's Statement.

WHERE MUST STATEMENTS BE FILED?

State Officer—With your agency (State Senators file with the Secretary of the Senate, the Treasurer with the Treasurer's Office, etc.)

Judge-With the clerk of your court

County Planning Commissioner-With the county clerk or your agency*

City Planning Commissioner-With the city clerk or your agency*

County Officer-With your county clerk

City Officer-With your city clerk

All Statements of Economic Interests filed by the above-mentioned officeholders are forwarded to the filing officer, the Fair Political Practices Commission, by the agency which receives the Statement. Copies of Statements filed by members of the Legislature will be sent by the Fair Political Practices Commission to the counties where the legislators reside and to the counties containing the most registered voters in the legislators' election districts.

WHAT INTERESTS MUST BE DISCLOSED?

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

- -Investments (partnerships, common stock, etc.)
 - -Worth more than \$1,000
 - -In business entities located in, or doing business in, your jurisdiction
- -Interests in real property
 - -Worth more than \$1,000
 - -Located in your jurisdiction
- -Sources of income
 - -Aggregating \$250 or more received during the reporting period
 - -Located in, or doing business in, your jurisdiction
- -Source of loans
 - -Aggregating \$250 or more received or outstanding during the reporting period
 - -Located in, or doing business in, your jurisdiction
- -- Source of gifts
 - -Aggregating \$50 or more received during the reporting period
 - -Located inside or outside the jurisdiction
- -Honorarium
 - -- Aggregating \$50 or more received during the reporting period
 - -From sources located inside or outside the jurisdiction
- -Interests in real property and investments held by a business entity or trust
- -- Income and loans to a business entity

Detailed explanations of these interests are provided in this Manual and on the Statement of Economic Interests (Form 721).

Varies with each city or county

HOW TO COMPLETE A STATEMENT OF ECONOMIC INTERESTS

Definitions of terms frequently used in the schedules:

"Jurisdiction"—means the state if you are a judge or a state officeholder or a person who has left those offices, the county if you are a county officeholder or a person who has left a county office, or the city if you are a city officeholder or a person who has left a city office.

A business entity or source of income is in the jurisdiction if it or a related business entity:

- -ls located or resides in the jurisdiction.
- -Does business 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.

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

"Immediate Family"—means yourself, your spouse, and your dependent children.

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

For information on blind trusts, see Appendix I. For information on reporting interests in rental property, see Appendix II.

COVER SHEET AND SUMMARY PAGE

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

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

The summary page requires you to indicate whether each of the eight schedules is:

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

As the only kinds of interests which must be disclosed on a candidate or assuming office Statement are investments and interests in real property (Schedules A through C), you do not have to fill out Schedules D through H on such a Statement, nor do you have to make any indication regarding them on the Summary Page.

Before completing the schedules, read the instructions on the Statement of Economic Interests (Form 721) and in this Manual.

EXAMPLE, SUMMARY PAGE

Complete the summary page on your Statement only after reading the instructions on your Statement of Economic Interests (Form 721) and in this Manual, and after completing the appropriate schedules.

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

- Schedule A—Investments. You have an investment in a land development company, located in your jurisdiction, worth more than \$1,000. You reported it on Schedule A. On the summary page, under Schedule A—Investments, check the box for "Schedule completed and attached."
- Schedule B—Interests In Real Property. The only real property that you own is your residence, which is exempt from disclosure. Thus, you did not complete Schedule B. On the summary page, under Schedule B—Interests in Real Property, check the box for "No reportable interests."
- Schedule C—Interests in Real Property and Investments Held by Business Entities or Trusts. Because you have a 50% ownership interest in your land development company, you were required to, and did, complete Schedule C by reporting interests in real property and investments held by your land development company, worth more than \$1,000. On the summary page, under Schedule C—Interests in Real Property and Investments Held by Business Entities or Trusts, check the box for "Schedule completed and attached."
- Schedule D—Income. You received income from your land development company which you reported on Schedule D. On the summary page, under Schedule D—Income, check the box for "Schedule completed and attached."
- Schedule E-Loans. You did not receive any loans and did not complete Schedule E. On the summary page, under Schedule E-Loans, check the box for "No reportable interests."
- Schedule F—Gifts. You did not receive any gifts and did not complete Schedule F. On the summary page, under Schedule F—Gifts, check the box for "No reportable interests."
- Schedule G—Honoraria. You did not receive any honoraria and did not complete Schedule G. On the summary page, under Schedule G—Honoraria, check the box for "No reportable interests."
- Schedule H—Income and Loans to Business Entities. Your pro rata share of a payment received by your land development company from a client located in your jurisdiction was over \$10,000. You reported the name of this client on Schedule H. On the summary page, under Schedule H—Income and Loans to Business Entities, check the box for "Schedule completed and attached."

The summary page would appear as follows: SCHEDULE A-Investments Schedule completed and attached No reportable interests SCHEDULE B-Interests in Real Property Schedule completed and attached No reportable interests SCHEDULE C-Interests in Real Property and Investments Held by Business Entities or Trusts Schedule completed and attached No reportable interests SCHEDULE D-Income (Other than Gifts and Loans) Schedule completed and attached No reportable interests SCHEDULE E-Loans Schedule completed and attached No reportable interests SCHEDULE F-Gifts Schedule completed and attached No reportable interests SCHEDULE G-Honoraria Schedule completed and attached No reportable interests SCHEDULE H-Income to Business Entities Schedule completed and attached No reportable interests NOTE: Filers whose reportable interests on any particular schedule have not changed since a previously filed annual Statement may attach copies of the appropriate schedule from the previous annual Statement. Please discard those schedules on which you have nothing to report. VERIFICATION I declare under penalty of perjury that I have used all reasonable diligence in preparing this Statement, that I have reviewed

the attached schedules and to the best of my knowledge the information provided in this Statement is true and correct.

Executed on . _ , 19 ____ , at __ SIGNATURE

(FILER'S SIGNATURE)

Filing this Statement may not relieve you of the obligation to file under the Conflict of Interest Code for any other agency. Consult your filing officer or the Fair Political Practices Commission.

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

NOTE TO AGENCIES: Make and retain copies of all Statements filed with you and forward the originals within five days of the filing deadline (or if filed late, within five days of receipt) to: The Fair Political Practices Commission, Legal Division, P.O. Box 807, Sacramento, California 95804, (916) 322-6444.

SCHEDULE A Investments

You must report investments (i.e., any financial interest in, or security issued by, a business entity, including, but not limited to, common stock, preferred stock, bonds, warrants, options, debt instruments and any partnership or other ownership interest) located in, or doing business in, your jurisdiction, in which you and your immediate family had an aggregate interest of more than \$1,000 during the reporting period.

EXCEPTIONS: You are not required to disclose the following:

- —Time or demand deposits in financial institutions (e.g., bank accounts, savings accounts)
- -Shares in a credit union
- -Insurance policies
- -Bonds and other debt instruments issued by any government or government agency
- -Diversified mutual funds registered with the Securities and Exchange Commission
- -Common trust funds created under California Financial Code Section 1564
- —Investments acquired by a blind trust pursuant to FPPC Regulation 18235 (For a discussion on blind trusts see Appendix I, following Schedule H.)

For each reportable investment you must report the following:

- -Nature of the investment (e.g., common stock, partnership).
- -Name of the business entity and a general description of its business activity.
- —Date you acquired or disposed of the investment if you did so during the period covered by the Statement (not applicable to assuming office or candidate Statements).
- —Value of your investment. For purposes of determining the value of an investment, you should use the highest fair market value of the asset during the period. For assuming office Statements, you should use the fair market value of the asset as of the date you assumed office. The fair market value of a publicly traded stock is determined by its reported selling price. The fair market value of a non-public stock is determined by the price at which it was sold, or by some other reasonable measure.
- —Ownership interest. Report whether you, your spouse and your immediate family had an ownership interest of less than 10%, or 10% or greater, in a business entity.

EXAMPLE, SCHEDULE A

Assume that:

- -On February 1, you purchased \$800 worth of stock in XYZ Corporation.
- -On March 1, the stock had a market value of \$1,200.
- -On May 1, you sold the stock for \$900.
- —You have a 50 percent partnership interest in ABC Land Developers, valued at \$250,000, which you did not acquire or dispose of during the reporting period.

Both ABC Land Developers and XYZ Corporation do business in your jurisdiction. The stock in XYZ Corporation must be listed because your investment was worth more than \$1,000 for part of the period covered by the Statement. Schedule A should be completed as follows:

NAME OF BUSINESS ENTITY XYZ Corporation NATURE OF INTERESTS, E.G., COMMON STOCK, PARTNERSHIP INTEREST, ETC. Common Stock		VALUE	X \$1,001-\$10,000
			S10,001-\$100,000 Over\$100,000
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Manufactures Widgets	X ACQUIRED DATE 2/1/82 DISPOSED 5/1/82	OWNERSHIP	* Less than 10% 10% or greater
NAME OF BUSINESS ENTITY ABC Land Developers		VALUE	\$1,001-\$10,000
NATURE OF INTERESTS, E.G., COMMON STOCK, PARTI Partnership	sala maan	☐ \$10,001-\$100,000 ☐ Over \$100,000	
GENERAL DESCRIPTION OF BUSINESS ACTIVITY Land Developer	ACQUIRED DATE	OWNERSHIP	Less than 10% 10% or greater

SCHEDULE B Interests in Real Property

You must report interests in real property (including any leasehold¹, beneficial or ownership interest, or an option to acquire such an interest) located in your jurisdiction, in which you and your immediate family had an aggregate interest of more than \$1,000 during the reporting period.

EXCEPTIONS: You are not required to disclose the following:

- —Your principal place of residence. However, if your principal place of residence is also a place of business, e.g., a family farm or retail store, you are required to disclose that portion of the interest in real property which is used in connection with your business activities.
- —Interests in real property acquired by a blind trust pursuant to FPPC Regulation 18235. (For a discussion of blind trusts see Appendix I, following Schedule H.)

^{*} If you have a 10% or greater ownership interest in a business entity, you may have to report your pro rata share of the gross income of, or the interests in real property and investments held by, the business entity on Schedules C, D or H. Note: You must report any salary, commission, distribution or other income paid to you or your spouse by a business entity on Schedule D, whether or not you have a 10% ownership interest.

¹ An interest in a lease on real property which will not expire for at least ten years after the first day of the period covered by your Statement is reportable if the value of the leasehold interest is more than \$1,000. The value of the leasehold interest is the total amount of rent owed by you during the period covered by the Statement or, on a candidate or assuming office Statement, during the prior 12 months. No leasehold interest of less than 10 years or with a value of \$1,000 or less need be reported. When reporting a leasehold interest, you must include the number of years remaining on the lease, the address or other precise location of the leased property and the date upon which the lease became effective, if this occurred during the period covered by the Statement.

For each reportable interest in real property you must report the following:

- —Street address and city or county. If there is no street address, you must state the lot number and subdivision, the assessor's parcel number, or other precise location of the real property.
- -Nature of your interest (e.g., equity, deed of trust, option, etc.)
- -Date you acquired or disposed of the real property if you did so during the period covered by the Statement.
- —Value of your interest. The value of property you own is your equity interest, which consists of the fair market value of the property (including any appreciation since it was purchased) minus any outstanding debt secured by the property.
- —Whether you, your spouse and your immediate family had an ownership interest of less than 10%, or 10% or greater, in the rental property.

EXAMPLE, SCHEDULE B

Assume that:

- —You have a 25 percent interest in a commercial rental building at 14738 Spruce Street, Little Town. Your equity in the building is \$85,000 and you did not acquire or dispose of the property during the reporting period;
- —During the reporting period, you paid \$4,500 to obtain an option to buy a parcel of land described as AP 5748 47390, Blossom County.

Both pieces of property are located within your jurisdiction. Schedule B should be completed as follows:

STREET ADDRESS OR PRECISE LOCATION OF PROPERTY 14738 Spruce Street, Little Town			\$1,001-\$10,000	
THE RESERVE AND ADDRESS OF THE PARTY OF THE	ST, E.G., EQUITY, OPTION			Over \$100,000
ACQUIRED DISPOSED	DATE	IF RENTAL PROPERTY, OWNERSHIP II	NTEREST IS . X	Less than 10% 10% or greater
AP 5748 47390, Blossom County		VALUE		\$1,001-\$10,000 \$10,001-\$100,000 Over \$100,000
Option	BT, E.G., EQUITY, OPTION			Over \$100,000
ACQUIRED DISPOSED	Pebruary 2, 1982	IF RENTAL PROPERTY, OWNERSHIP II	NTEREST IS . X	Less than 10% 10% or greater

^{*} If you check 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 your pro rata share of the gross rental paid by any individual tenant (if \$10,000 or more) on Schedule H.

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

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

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

This reporting requirement applies regardless of where your business entity is located or doing business.

For each reportable interest in real property or investment you must provide the same information that is required for any other interest in real property or investment. (See discussions of Schedules A and B.)

Business Entities: The business entity holding the interest in real property or investments may have to be reported on Schedule A.

Trusts: According 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

Assume that:

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

Schedule C-1 Interests in Real Property

AP 029 589202, Blossom County	VALUE	\$1,001-\$10,000
NATURE OF INTEREST, E.G., EQUITY, OPTION Equity		\$10,001-\$100,000
☐ ACQUIRED DATE ☐ DISPOSED		X Over \$100,000
Schedule C-2 Investments		
Investments NAME OF BUSINESS ENTITY OR TRUST HOLDING INVESTMENTS		
Investments	VALUE	× \$1,001-\$10,000
NAME OF BUSINESS ENTITY OR TRUST HOLDING INVESTMENTS ABC Land Developers NAME OF BUSINESS ENTITY	VALUE	× \$1,001-\$10,000 \$10,001-\$100,000

Your 50% interest in ABC Land Developers may have to be reported on Schedule A.

SCHEDULE D Income (Other Than Gifts and Loans)

You must disclose gross income (other than gifts and loans) aggregating \$250 or more received during the reporting period from any source which is within your jurisdiction. Your income includes your community property interest in the income of your spouse. Your income also includes your pro rata share of any income of a trust in which you and your spouse have a 10% or greater interest. To determine if you have an interest in a trust, see the instructions on Schedule C.

Some common forms of income to be reported on this schedule include salary, income from a business, wages, interest, proceeds from any sale, including sale of your house or car, forgiveness or payment of an indebtedness received by you, per diem, and reimbursement for expenses. If you sell your house or car, the total sales price is reportable regardless of any obligation you might have to pay on loans secured by the property.

Income in the form of loans should be reported on Schedule E and income in the form of gifts should be reported on Schedule F.

EXCEPTIONS: You need not disclose income on a candidate's or assuming office Statement. In addition, you are not required to disclose the following:

- —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 Securities and Exchange Commission of the U.S. Government
- -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 or government agency
- -Income of dependent children
- -Alimony or child support payments
- -Redemption of a mutual fund
- —Payments received under a defined benefit pension plan qualified under Internal Revenue Code Section 401(a)
- —Income from assets acquired by a blind trust (For a discussion of blind trusts see Appendix I following Schedule H.)

When income from a reportable source is disclosed, you must include the following:

- -Name of the source of income
- -Address of the source of income
- -Business activity of the source of income
- -Description of the consideration for which the income was received
- -Amount or value received

EXAMPLE, SCHEDULE D

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

- -\$2,000 in dividends from stock registered with the Securities and Exchange Commission;
- -\$35,000 in salary from Smith & Jones Insurance Company which is in your jurisdiction;
- -\$1,500 in interest and repayment of a loan from Ace Plumbing, which is not in your jurisdiction;
- -\$1,200 per diem from the city for your services as councilmember;
- —\$4,800 in total rental income from a duplex, which is in your jurisdiction.

Your spouse received \$18,000 in salary from General Widget Company, a manufacturing firm in your jurisdiction.

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

- —The dividend income, because the stock is registered with the Securities and Exchange Commission;
- —The interest and repayment from Ace Plumbing because it is not located in your jurisdiction, nor does it do business within your jurisdiction;
- —The per diem from the city for your services as a councilmember.

With respect to your spouse's income, only your community property interest (50%) is reportable.

Schedule D should be completed as follows:

NAME OF SOURCE OF INCOME Smith and Jones Insurance Company	AMOUNT	T - 2050 54 000
ADDRESS OF SOURCE OF INCOME 110 Main Street, Mudville, California	A MOON	\$250-\$1,000
BUSINESS ACTIVITY OF SOURCE OF INCOME, IF ANY Insurance Brokerage		\$1,001-\$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED Personal Services		X . Over \$10,000
NAME OF SOURCE OF INCOME Duplex	AMOUNT	
ADDRESS OF SOURCE OF INCOME 104 Main Street, Mudville, California		\$250-\$1,000
BUSINESS ACTIVITY OF SOURCE OF INCOME, IF ANY Rental Property		X \$1,001-\$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED Rental		Over \$10,000
NAME OF SOURCE OF INCOME General Widget Company		
ADDRESS OF SOURCE OF INCOME 567 Main Street, Mudville, California	AMOUNT	\$250-\$1,000
BUSINESS ACTIVITY OF SOURCE OF INCOME, IF ANY Manufactures Widgets		X \$1,001-\$10,000
DESCRIPTION OF THE CONSIDERATION FOR WHICH INCOME WAS RECEIVED Personal Services of spouse		Over \$10,000

SCHEDULE E Loans

You must report loans to either yourself or your spouse, aggregating \$250 or more which were received or were outstanding during the reporting period from any source located in, or doing business in, your jurisdiction.

EXCEPTIONS: You need not disclose loans on a candidate's or assuming office Statement, in addition, you are not required to disclose the following:

- —Any loan from a commercial lending institution used to purchase your principal place of residence if the loan was made in the lender's regular course of business on terms available to members of the public without regard to official status.
- —Any loan or loans from a commercial lending institution on which the aggregate amount owed does not exceed \$10,000 at any time during the period covered by the Statement, if the loan or loans were made in the lender's regular course of business on terms available to the public without regard to official status.
- —Any indebtedness created as part of a retail installment or credit 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 does not exceed \$10,000 at any time during the period covered by the Statement.
- —Any loan from 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 lender is acting as an intermediary or agent for any person not covered by this provision.

For each loan, you must disclose the following:

- -The name of the lender
- -The address of the lender
- -The business activity of the lender
- -The security, if any, given for the loan
- -The annual interest rate
- -Whether the entire loan has been repaid
- -The highest amount outstanding on the loan at any time during the reporting period.

EXAMPLE, SCHEDULE E

Assume that:

- —In 1977, you bought your home and financed it with a mortgage through a savings and loan on their standard terms and with a second mortgage which the seller, Joe Smith, took in place of a larger down payment. Both the savings and loan and Joe Smith are located in your jurisdiction. At the beginning of 1982, you owed Smith \$2,000 and during the year you paid him back enough so that you owed him \$800.
- —In 1981, you bought a car which you financed through a dealer, located in your jurisdiction, at his standard terms. The highest amount you owed him at any time during the year was \$7,000.

You do not have to report:

- —The debt to the auto dealer since it resulted from a retail installment or credit transaction and did not aggregate more than \$10,000 at any time during the year;
- -The mortgage held by the savings and loan because it was used to purchase your principal place of residence.

You must report:

—The debt to Joe Smith at the highest amount owed during the reporting period. Although the loan was used to purchase your principal place of residence, it was not a loan made by a commercial lender in the regular course of business on terms available to members of the public without regard to official status.

Schedule E should be completed as follows:

NAME OF LENDER Joe Smith ADDRESS OF LENDER 123 Main Street, Little Town		Amount of		\$250-\$1,000	
		Highest Balance	X \$1,001-\$10,000		
Business activity of LENDER Building Contractor					Over \$10,000
SECURITY FOR LOAN HOME	NONE	ENTIRE LOAN	INTEREST RATE	Mil	NONE

SCHEDULE F

You must disclose gifts received during the reporting period aggregating \$50 or more from any source.

You have received a gift if you receive an item of value and do not provide anything of equal or greater value in return for that item. 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 or if you give it away to other persons. 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" is not adequate disclosure. Gifts are reportable without regard to where the donor is located.

EXCEPTIONS: You need not disclose gifts on a candidate's or assuming office Statement. In addition, you are not required to disclose the following:

- -Food, drink or lodging provided in an individual's home.
- —Gifts approximately 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 donor is acting as an agent or intermediary for a reportable source of income.

—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.

For each gift you must disclose the following:

-Name of the donor

-Address of the donor

-Business activity, if any, of the donor

-Date the gift was received

-Value of the gift

-Description of the gift

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

EXAMPLE, SCHEDULE F

Assume that:

- -You receive season tickets worth \$300 to a professional baseball team from Valley Pipe Systems.
- -You receive a complimentary dinner worth \$75 from Le Connoisseur Restaurant.

Schedule F should be completed as follows:

NAME OF DONOR Valley Pipe Systems	DATE(S) OF GIFT(S) March 1, 1982
ADDRESS OF DONOR 200 E. Fifth, Hometown	VALUE OF GIFT(S) \$300
BUSINESS ACTIVITY OF DONOR, IF ANY Manufactures irrigation & plumbing supplies	Season tickets to Hometown A's baseball team
NAME OF DONOR Le Connoisseur Restaurant	DATE(S) OF GIFT(S) September 15, 1982
ADDRESS OF DONOR 1100 Broadway, Little Town	VALUE OF GIFT(S) \$75
BUSINESS ACTIVITY OF DONOR, IF ANY Restaurant	DESCRIPTION OF GIFT(S) Complimentary dinner

SCHEDULE G Honoraria

An honorarium is a payment you receive for speaking at an event, participating in a panel or seminar or engaging in a similar activity.

You may choose either of two methods for reporting honoraria:

 You may report all honoraria of \$50 or more received during the reporting period on Schedule G (Honoraria), or

- 2. You may report honoraria received during the reporting period on Schedule D (Income) and Schedule F (Gifts). If you choose this method, you should report honoraria as follows:
 - —If you did not provide services of equal or greater value than the honorarium, the entire honorarium is a gift, which should be reported on Schedule F if it was \$50 or more.
 - —If you did provide services of equal or greater value than the honorarium, the entire honorarium is income which should be reported on Schedule D if it was \$250 or more. It is up to you to demonstrate that you provided services of equal or greater value than the honorarium if you choose to treat it as income rather than as a gift.

If you report honoraria on Schedule G, you must report the

- -Name of the source of the payment
- -Address of the source of the payment
- -Business activity of the source of the payment
- -Date of the payment
- -Amount or value of the payment
- -Description of the services you provided

You may wish to provide other relevant information with respect to the circumstances under which an honorarium was received.

An employee of a State agency who wishes to accept an honorarium from a lobbyist who is registered to influence your agency should consult FPPC Regulation 18623 to determine whether this will violate the Act.

EXCEPTIONS: With respect to an event at which you speak, serve on a panel, lead a seminar, or provide similar services, you are not required to disclose the following:

- -Free admission, food, beverages and similar nominal benefits provided at the event
- -Reimbursement or advance for actual travel within California to and from the event
- Reimbursement or advance for necessary accommodations provided directly in connection with the event

EXAMPLE. SCHEDULE G

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

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

You are provided with dinner before your speech.

You do not have to report:

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

If you choose to report the \$300 honorarium, along with all other honoraria you receive during the reporting period, on Schedule G (Honoraria) (rather than use the other reporting method described above), it would appear as follows:

American Growers Association	DATE(S) OF PAYMENT(S) 10/1/82	
ADDRESS 77 Green Lane, Mudville, California	\$300	
BUSINESS ACTIVITY, IF ANY, OF SOURCE Produce growers	SPECIFIC DESCRIPTION OF SERVICES RENDERED Keynote speaker at annual convention	

SCHEDULE H INCOME AND LOANS TO BUSINESS ENTITIES (Including 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), you must provide the name of each individual or entity which:

- 1. Is located in, or is doing business in, your jurisdiction; and
- 2. Made payments including loans, to the business entity or rental property if your pro rata share of such payments (including your community property interest in your spouse's share) is \$10,000 or more.

This reporting requirement applies regardless of where your business entity is located or doing business.

FPPC Regulation 18740 contains information regarding the procedure for exempting from disclosure clients' names which are legally recognized as privileged under California law. If you wish to obtain such an exemption, you may obtain a copy of Regulation 18740 by contacting the Fair Political Practices Commission.

The business entity must be reported on Schedule A and the gross income from the business must be reported on Schedule D.

EXAMPLE, SCHEDULE H

Assume that:

- —During the reporting period ABC Land Developers, of 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 located in your jurisdiction.
- —You personally own a commercial building from which income was received from a single rental tenant in the amount of \$40,000. You have a 25% ownership interest in the commercial building, which is located 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 would be \$15,000 and would meet the 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 would not meet the \$10,000 reporting threshold.
- —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 would be completed as follows:

NAME OF BUSINESS ENTITY	ADDRESS OF BUSINESS ENTITY
ABC Land Developers	5744 Tenth Street, Little Town
DESCRIPTION OF BUSINESS ACTIVITY OF BUSINESS ENTITY	
Land Developers	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY	
Little Town Bank	
NAME OF BUSINESS ENTITY	ADDRESS OF BUSINESS ENTITY
Commercial Rental Building DESCRIPTION OF BUSINESS ACTIVITY OF BUSINESS ENTITY	14738 Spruce Street
Rental property	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY	
Sylvan Taylor, M.D. (Rental tenant)	
bylvan laylor, h.b. (Rental tenant)	

APPENDIX I Blind Trusts

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

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

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

APPENDIX II Reporting Interests in Real Property

If you or your immediate family own a 10% or greater interest in a piece of rental property directly, i.e., not through a business entity, you should report:

- -The property on Schedule B;
- -Your share of the total amount of rents received from the property on Schedule D; and
- —The name of any tenants who pay rents of which your share is \$10,000 or more on Schedule H.

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 rental property, you should report:

- -The business entity on Schedule A;
- -The property on Schedule C;
- —Your share of the total amount of income received from the business entity, including rents, on Schedule D; and
- —The name of any tenants who pay rents of which your share is \$10,000 or more on Schedule H.

If you or your immediate family own less than a 10% interest in a piece of rental property directly, i.e., not through a business entity, you should report:

- -The property on Schedule B; and
- -Your share of the total amount of rents received from the property on Schedule D.

You do not have to report the name of any tenants.

If you or your immediate family own less than a 10% interest of a business entity, such as a partnership or joint venture, which owns rental property, you should report:

- -The business entity on Schedule A; and
- -Your share of the income received from the business entity, including rents on Schedule D.

You do not have to report either the rental property or the tenants.