

# 2021-2022 Statement of Economic Interests



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## Form 700

### A Public Document

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### California Fair Political Practices Commission

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Telephone: (916) 322-5660 • Website: [www.fppc.ca.gov](http://www.fppc.ca.gov) Helpful Resources





7\SHV RI 6WDWHPHQWV

\$VVXPLQJ 2^FH 6WDWHPHQW

STATEMENT OF ECONOMIC INTERESTS  
COVER PAGE  
A PUBLIC DOCUMENT

\$ Q Q X D O The period covered ~~2021~~ through  
December ~~31~~ 2021

The period covered is

/ H D Y L Q J 2 1 À F H Date Left \_\_\_\_\_  
(Check one circle.)

The period covered is January ~~2021~~, through the date of  
O H D Y L Q J R I ¿ F H

The period covered is / \_\_\_\_ / \_\_\_\_\_, through  
W K H G D W H R I O H D Y L Q J R I ¿ F H

Schedule C Income, Loans, & Business Positions schedule attached  
Schedule D Income – Gifts schedule attached  
Schedule E Income – Gifts – Travel Payments schedule attached

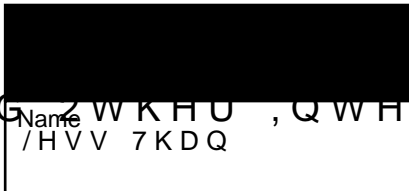
# Instructions Cover Page

(QWHU \RXU QDPH PDLQLQJ DGGUHV V DQG GD\WLPH WHOHSKRQH  
number in the spaces provided. %HFDXVH WKH )RUP LV D  
public document, \RX PD\ OLVW \RXU EXVLQHVV R^FH DGGUHV V  
LQVWHDG RI \RXU KRPH DGGUHV V  
3DUW 2^FH \$JHQF\ RU &RXUW  
• (QWHU WKH QDPH RI WKH R^FH VRXJKW RU KHOG RU WKH F D

SCHEDULE A-1

Investments

6 WRFNV %RQGV DQG ZWKHU, QWHUHV  
2ZQHUVKLS, QWHUHV LV /HVV 7KDQ



Investments must be itemized.

'R QRW DWDFK EURNHVDJH RU QDQFLDO VWDWHPHQWV

y 1\$0( 2) %86,1(66 (17,7<

y 1\$0( 2) %86,1(66 (17,7<

\*(1(5\$/ '(6&5,37,21 2) 7

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## Instructions – Schedules A-1 and A-2 Investments

<sup>3</sup>, QYHVWPHQW´ PHDQV D ¿ QDQFLDO LQWHUHVW LQ DQ\ EXVLQHVV  
 entity (including a consulting business or other  
 LQGHSHQGHQW FRQWUDFWLQJ EXVLQHVV WKDW LV ORFDWHG LQ GRLQJ  
 EXVLQHVV LQ SODQQLQJ WR GR EXVLQHVV LQ RU WKDW KDV GRQH  
 EXVLQHVV GXULQJ WKH SUHYLRXV WZR \HDUV LQ \RXU DJHQF\¶V  
 MXULVGLFWLRQ LQ ZKLFK \RX \RXU VSRXVH RU UHJLVWHUHJ  
 GRPHVWLF SDUWQHUV RU \RXU GHSHQGHQW FKLOGUHQ KDG D GLUHF  
 LQGLUHF RU EHQH¿FLDO LQWHUHVW WRWDOLQJ RU PRUH DW  
 any time during the reporting period. (See Reference  
 3DPSKOHW SDJH

Reportable investments include:

- 6WRFNV ERQGV ZDUUDQWV DQG RSWLRQV LQFOXGLQJ WKRVH  
 held in margin or brokerage accounts and managed  
 LQYHVWPHQW IXQGV 6HH 5HIHUHQFH 3DPSKOHW SDJH
- Sole proprietorships
- <RXU RZQ EXVLQHVV RU \RXU VSRXVH¶V RU UHJLVWHUHJ  
 GRPHVWLF SDUWQHUV¶V EXVLQHVV 6HH 5HIHUHQFH 3DPSKOHW  
 SDJH IRU WKH GH¿QLWLRQ RI <sup>3</sup>EXVLQHVV HQWLW\´
- <RXU VSRXVH¶V RU UHJLVWHUHJ GRPHVWLF SDUWQHUV¶V  
 investments even if they are legally separate property
- 3DUWQHUVKLSV H J D ODZ ¿UP RU IDPLO\ IDUP
- ,QYHVWPHQWV LQ UHSRUWDEOH EXVLQHVV HQWLWLHV KHOG LQ D  
 UHJLVWHUHJ DFFRXQW 6HH 5HIHUHQFH 3DPSKOHW SDJH
- ,I \RX \RXU VSRXVH RU UHJLVWHUHJ GRPHVWLF SDUWQHUV



SCHEDULE A-2  
Investments, Income, and Assets

RI %XVLQHVV (QWLWL  
2ZQHUVKLS ,QWHUHVW LV

Name HV 7UXVWV RU *UHDWHU
---------------------------------

1 \$785( 2) ,19(670(17 Partnership	_____	Other
_____	_____	_____

Instructions – Schedule A-2  
, QYHVWPHQWV , QFRPH DQG \$VVHWV RI %XVLQHVV (

Use Schedule A-2 to report investments in a business entity (including a consulting business or other



,QVWUXFWLRQV ± 6FKHG XOH %  
,QWHUHVWV LQ 5HDO 3URSHUW\

5HSRUW LQWHUHVWV LQ UHDO SURSHUW\ ORFDWHG LQ \RXU DJHQF\¶V  
MXULVGLFWLRQ LQ ZKLFK \RX \RXU VSRXVH RU UHJLVWHUHG GRPHVWLF  
SDUWQHUV RU \RXU GHSHQGHQW FKLOGUHQ KDG D GLUHFW LQGLUHFW RU  
EHQH¿FLDO LQWHUHVW WRWDOLQJ RU PRUH DQ\ WLPH GXULQJ

the reporting period. Real property is also considered to be  
³ZLWKLQ WKH MXULVGLFWLRQ´ RI D ORFDO JRYHUQPHQW DJHQF\ LI WKH  
property or any part of it is located within two miles outside  
WKH ERXQGDULHV RI WKH MXULVGLFWLRQ RU ZLWKLQ WZR PLOHV RI DQ\  
land owned or used by the local government agency. (See  
5HIHUHQFH 3DPSKOHW SDJH

,QWHUHVWV LQ UHDO SURSHUW\ LQFOXGH

- \$ RZQHUVKLS LQWHUHVW LQFOXGLQJ D EHQH¿FLDO RZQHUVKLS  
LQWHUHVW
- \$ GHHG RI WUXVW HDVHPHQW RU RSWLRQ WR DFTXLUH SURSHUW\  
LQWHUHVW
- \$ OHDVHKROG LQWHUHVW 6HH 5HIHUHQFH 3DPSKOHW SDJH
- A mining lease
- An interest in real property held in a retirement account  
6HH 5HIHUHQFH 3DPSKOHW SDJH
- An interest in real property held by a business entity or  
WUXVW LQ ZKLFK \RX \RXU VSRXVH RU UHJLVWHUHG GRPHVWLF  
SDUWQHUV DQG \RXU GHSHQGHQW FKLOGUHQ WRJHWKHU KDG D  
RU JUHDWHU RZQHUVKLS LQWHUHVW 5HSRUW RQ 6FKHG XOH \$
- <RXU VSRXVH¶V RU UHJLVWHUHG GRPHVWLF SDUWQHUV¶V LQWHUHVWV LQ  
real property that are legally held separately by him or her

You are not required to report:

- \$ UHVLGHQFH VXFK DV D KRPH RU YDFDWLRQ FDELQ XVHG  
H[FOXVLYHO\ DV D SHUVRQDO UHVLGHQFH +RZHYHU D UHVLGHQFH  
€p cy V P c \$ GH ï! c Ð u P p ` € € 0 P € • € P € ` € 0 0 @ 0 ° ð € p ð 0 0 @ € 0 @ € Á

SCHEDULE C  
 , Q F R P H / R D Q V %  
 Positions  
 2 W K H U W K D Q \* L I W V D Q G 7

**CALIFORNIA FORM 700**  
 FAIR POLITICAL PRACTICES COMMISSION

Name  
 J D Y H O 3 D \ P H Q W V

y 1. INCOME RECEIVED	y 1. INCOME RECEIVED
<p>1 \$ 0 ( 2 ) 6 2 8 5 &amp; ( 2 ) , 1 &amp; 2 0 (</p> <hr/> <p>ADDRESS (Business Address Acceptable)</p> <hr/> <p>% 8 6 , 1 ( 6 6 \$ &amp; 7 , 9 , 7 &lt; , ) \$ 1 &lt; 2 ) 6 2 8 5 &amp; (</p> <hr/> <p>&lt; 2 8 5 % 8 6 , 1 ( 6 6 3 2 6 , 7 , 2 1</p> <hr/> <p>* 5 2 6 6 , 1 &amp; 2 0 ( 5 ( &amp; ( , 9 ( ' No ncome - Business Position Only</p> <p style="text-align: center;">2 9 ( 5</p> <p style="text-align: center;">(Real property, car, boat, etc.)</p>	<p>1 \$ 0 ( 2 ) 6 2 8 5 &amp; ( 2 ) , 1 &amp; 2 0 (</p> <hr/> <p>ADDRESS (Business Address Acceptable)</p> <hr/> <p>% 8 6 , 1 ( 6 6 \$ &amp; 7 , 9 , 7 &lt; , ) \$ 1 &lt; 2 ) 6 2 8 5 &amp; (</p> <hr/> <p>&lt; 2 8 5 % 8 6 , 1 ( 6 6 3 2 6 , 7 , 2 1</p> <hr/> <p>* 5 2 6 6 , 1 &amp; 2 0 ( 5 ( &amp; ( , 9 ( ' No ncome - Business Position Only</p> <p style="text-align: center;">2 9 ( 5</p> <p style="text-align: center;">(Real property, car, boat, etc.)</p>

y 2.

<p>NAME OF LENDER*</p> <hr/> <p>ADDRESS (Business Address Acceptable)</p> <hr/> <p>% 8 6 , 1 ( 6 6 \$ &amp; 7 , 9 , 7 &lt; , ) \$ 1 &lt; 2 ) / ( 1 ' ( 5</p> <hr/> <p>+, * + ( 6 7 % \$ / \$ 1 &amp; ( ' 8 5 , 1 * 5 ( 3 2 5 7 , 1 * 3 ( 5 , 2 '</p> <p style="text-align: center;">2 9 ( 5</p>	<p>, 1 7 ( 5 ( 6 7 5 \$ 7 (                      7 ( 5 0 0 R Q W K V &lt; H D U V</p> <p style="text-align: center;">None</p>
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Comments: \_\_\_\_\_

Instructions – Schedule C

,QFRPH /RDQV %XVLQHVV 3RVLWLRQV  
,QFRPH 2WKHU 7KDQ \*LIWV DQG 7UDYHO 3D\PHQ

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Reporting Income:

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting

H[SHQVHV ORVVHV RU WD[HV DQG LQFOXGHV ORDQV RWKHU than loans from a commercial lending institution. (See

5HIHUFH 3DPSKOHW SDJH <RX PXVW DOVR UHSRUW WKH source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

SCHEDULE D  
Income – Gifts

# Instructions – Schedule D Income – Gifts

A gift is anything of value for which you have not provided             
HTXDO RU JUHDWHU FRQVLGHUDWLRQ WR WKH GRQRU \$ JLIW LV  
UHSRUWDEOH LI LWV IDLU PDUNHW YDOXH LV RU PRUH ,Q DGGLWLRQ  
multiple gifts totaling \$50 or more received during the  
reporting period from a single source must be reported.

,W LV WKH DFFHSWDQFH RI D JLIW QRW WKH XOWLPDWH XVH WR ZKLFK LW LV  
SXW WKDW LPSRVHV \RXU UHSRUWLQJ REOLJDWLRQ ([FHSW DV QRWHG  
EHORZ \RX PXVW UHSRUW D JLIW HYHQ LI \RX QHYHU XVHG LW RU LI \RX  
gave it away to another person.

,I WKH H[DFW DPRXQW RI D JLIW LV XQNQRZQ \RX PXVW PDNH D  
JRRG IDLWK HVWLPDWH RI WKH LWHP\IV IDLU PDUNHW YDOXH /LVWLQJ  
the value of a gift as “over \$50” or “value unknown” is not  
DGHTXDWH GLVFORVXH ,Q DGGLWLRQ LI \RX UHFHLYHG D JLIW WKURXJK  
DQ LQWHUPHGLDU\ \RX PXVW GLVFORVH WKH QDPH DGGUHVV DQG  
business activity of both the donor and the intermediary. You  
PD\ LQGLFDWH DQ LQWHUPHGLDU\ HLWKHU LQ WKH ‘VRXUFH’ ¿HOG  
after the name or in the “comments” section at the bottom  
of Schedule D.

&RPPRQ\ UHSRUWDEOH JLIWV LQFOXGH

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- 3DUNLQJ SDVVHV QRW XVHG IRU R^FLDO DJHQF\ EXVLQHV
- )RRG EHYUDJHV DQG DFFRPPRGDWLRQV LQFOXGLQJ WKRVH  
provided in direct connection with your attendance at a  
FRQYHQWLRQ FRQIHUHQFH PHHWLQJ VRFLDO HYHQW PHDO RU OLNH  
gathering
- Rebates/discounts not made in the regular course of  
EXVLQHV WR PHPEHUV RI WKH SXEOLF ZLWKRXW UHJDUG WR R^FLDO  
status
- :HGGLQJ JLIWV 6HH 5HIHUHQFH 3DPSKOHW SDJH
- \$Q KRQRUDULXP UHFHLYHG SULRU WR DVVXPLQJ R^FH <RX PD\  
UHSRUW DQ KRQRUDULXP DV LQFRPH RQ 6FKHGHOH & UDWKHU  
WKDQ DV D JLIW RQ 6FKHGHOH ' LI \RX SURYLGHG VHUFLFHV RI  
HTXDO RU JUHDWHU YDOXH WKDQ WKH SD\PHQW UHFHLYHG 6HH  
Reference 3DPSKOHW SDJH
- 7UDQVSRUWDWLRQ DQG ORGJLQJ 6HH 6FKHGHOH (
- Forgiveness of a loan received by you

## Reminders

x \*LIWV IURP D VLQJOH VRXUFH ~~limit D~~ UH VXEMHFW WR D  
2021 6HH 5HIHUHQFH 3DPSKOHW SDJH

x & RGH ¿ ~~only~~ need to report gifts from  
reportable sources.

## Gift Tracking Mobile Application

xFPCC has created a gift tracking app for mobile 56005200580055004 500440051 T AP @ iVSH ¿ OHUV WUD•D JLIWV



SCHEDULE E  
Income – Gifts  
7UDYHO 3D\PHQWV \$GYDQFHV  
and Reimbursements

x 0DUN HLWKHU WKH JLIW RU LQFRPH ER[

- 0DUN WKH <sup>3</sup> F ' ER[ IRU D WUDYHO SD\PHQW UHFHLYHG IURP D  
RU WKH <sup>3</sup>6SHHFK' ER[ LI \RX PDGH D VSHHF Rer Government Code SDWHG L  
Section 89506, tKHVH SD\PHQWV PD\ QRW EH VXEMHFW WR WKH JLIW OLF  
LQ D GLVTXDOLI\LQJ FRQÀLFW RI LQWHUHVW



## Restrictions and Prohibitions

The Political Reform Act (Gov. Code Sections 81000-

UHTXLUHV PRVW VWDWH DQG ORFDO JRYHUQPHQW R^FLDOV and employees to publicly disclose their economic

interests including personal assets and income. The

\$FW¶V FRQÀLFW RI LQWHUHV V SURYLVLRQV DOVR GLVWUXDOL\ D SXEOLF R^FLDO IURP WDNLQJ SDUW LQ D JRYHUQPHQWDO GHFLVLRQ LI LW

is reasonably foreseeable that the decision will have

D PDWHULDO ¿QDQFLDO H±HFW RQ WKH VH HFRQRPLF LQWHUHVW DV ZHOO DV WKH R^FLDO¶V SHUVRQDO ¿QDQFHV DQG WKRVH

of immediate family. (Gov. Code Sections 87100 and

7KH )DLU 3ROLWLFDO 3UDFWLFHV & RPPLVVLRQ )33&

is the state agency responsible for issuing the attached

6WDWHPHQW RI (FRQRPLF ,QWHUHVW )RUP DQG IRU LQWHUSUHWLQJ WKH \$FW¶V SURYLVLRQV

### Gift Prohibition

\*LIWV UHFHLYHG E\ PRVW VWDWH DQG ORFDO R^FLDOV HPSOR\HHV DQG FDQGLGDWHV DUH HQVXEMHFW WKH

gift limit increased to \$520 from a single source during a

FDOHQGDU \HDU ,Q 19 and 2020 WKH JLIW OLPLW ZDV \$500

from a single source during a calendar year.

\$GGLWLRQDO\ VWDWH R^FLDOV VWDWH FDQGLGDWHV DQG FHUWDLQ VWDWH HPSOR\HHV DUH VXEMHFW WR D OLPLW SHU FDOHQGDU PRQWK RQ JLIWV IURP OREE\LWV DQG OREE\LQJ ¿UPV UHJLVWHUHG ZLWK WKH 6HFUHWDU\ RI 6WDWH 6HH 5HIHUHQFH 3DPSKOHV page 10.

6WDWH DQG ORFDO R^FLDOV DQG HPSOR\HHV VKRXOG FKHFN ZLWK their agency to determine if other restrictions apply.

'LVTXDOL¿FDWLRQ

3XEOLF R^FLDOV DUH XQGDU FHUWDLQ FLUFXPVWDQFHV UHTXLUHG WR GLVWUXDOL\ WKHPVHOYHV IURP PDNLQJ SDUWLFLSDWLQJ LQ RU DWWHPSWLQJ WR LQÀXHQFH JRYHUQPHQWDO GHFLVLRQV WKDW ZLOO D±HFW WKHLU HFRQRPLF LQWHUHVW 7KLV PD\ LQFOXGH LQWHUHVW WKH\ DUH QRW UHTXLUHG WR GLVFORVH )RU H[DPSOH D SHUVRQDO UHVLGHQFH LV RIWHQ QRW UHSRUWDEOH EXW PD\ EH JURXQGV IRU GLVWUXDOL¿FDWLRQ 6SHFL¿F GLVWUXDOL¿FDWLRQ UHTXLUHPHQWV DSSO\ WR ¿OHU H J FLW\ FRXQFLOPHPEHUV PHPEHUV RI ERDUGV RI VXSHUYLVRUV SODQQLQJ FRPPLVVLRQHUV HWF 7KHVH R^FLDOV PXVW SXEOLF\ LGHQWLI\ WKH HFRQRPLF LQWHUHVW WKDW FUHDWHV D FRQÀLFW RI LQWHUHVW DQG OHDYH WKH URRP EIRUH a discussion or vote takes place at a public meeting. For PRUH LQIRUPDWLRQ FRQVXOW \*RYHUQPHQW &RGH 6HFU 6• \@°@Pö€€ Àö`@ www.

## Questions and Answers

### General

Q. What is the reporting period for disclosing interests statement?

4 0\ VSRXVH DQG , DUH FXUUHQWO\ VH SURFHVV RI REWDLQLQJ D GLYRUFH VSRXVHV LQFRPH LQYHVWPHQWV D property?

\$ 2Q DQ DVVXPLQJ R^FH VWDWHPHQW UHSRUWDEOH LQYHVWPHQWV LQWHUHVTVLQDO SURSHUW\ DQG business positions held on the date you assumed

\$ <HV SRFHDOO PXLV FRQWLQXH economic interests until such time as dissolution of PDUULDJH SURFHGHGLQJV LV ¿QDO +

R^FH ,Q DGGLWLRQ \RX PXVW GLVFORVH DOO UHSRUWDEOH ORDQV JLIWV DQG WUDYHO SD\PHQWV UHFHLYHG GXULQJ WKH PRQWKV SULRU WR WKH GDWH \RX DVVXPHG R^FH

property agreement has been reached prior to that WL UHFHLYHG GXULQJ WKH PRQWKV SULRU WR WKH GDWH \RX DVVXPHG R^FH

2Q D FDQGLGDWH VWDWHPHQW GLVFORVH DOO UHSRUWDEOH LQYHVWPHQWV LQWHUHVTVLQDO SURSHUW\ DQG EXVLQHVV SRVLWLRQV KHOG RQ WKH GDWH \RX ¿OH \RXU GHFODUDWLRQ RI candidacy. You must also disclose income (including

ORDQV JLIWV DQG WUDYHO SD\PHQWV UHFHLYHG GXULQJ WKH PRQWKV SULRU WR WKH GDWH \RX ¿OH \RXU GHFODUDWLRQ RI candidacy.

4 , KROG WZR RWKHU ERDUG SRVLWLRQV LQ DGGLWLRQ WR P\ SRVLWLRQ ZLWK WKH FRXQW\ 0XVW , ¿OH WKUHH VWDWHPHQWV RI economic interests?

\$ <HV WKUHH D\ZHUWHXUHQ LQVWHDG complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as

WKH DJHQFLHV IRU ZKLFK \RX ZLOO EH ¿OLQJ 'LVFORVH DOO UHSRUWDEOH HFRQRPLF LQWHUHVTVLQDO WKUHH MXULVGLFWLRQV on the expanded statement. File the expanded

statement for your primary position providing an original ^ZHW' VLJQDWXUH XQOHVV ¿OHG ZLWK D VHFXUH HOHFWURQLF signature. 6HH SDJH ~~File a copy~~ of the

expanded statement with the other two agencies as UHTXLUH E\ 5HJXODWLRQ F 5HPHPEHU WR complete separate statements for positions that you leave or assume during the year.

4 , DP D GHSDUWPHQW KH DG ZKR UHFHQWO\ EHJDQ DFWLQJ DV FLW\ PDQDJHU 6KRXOG , ¿OH DV WKH FLW\ PDQDJHU"

\$ <HV )LOH DQ DVVXPLQJ R^FH VWDWHPHQW DV FLW\ PDQDJHU 3HUVRQV VHUYLQJ DV ^DFWLQJ ^LQWHULP ^RU ^DOWHUQDWH^ PXVW ¿OH DV LI WKH\ KROG WKH SRVLWLRQ EHFDXVH they are or may be performing the duties of the position.

Questions and Answers  
Continued

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Q. The value of my stock changed during the reporting

SHULRG +RZ GR , UHSRUW WKH YDOXH RI WKH VWRFN"

\$ <RX DUH UHTXLUHG WR UHSRUW WKH KLJKHVW YDOXH WKDW WKH  
stock reached during the reporting period. You may

use your monthly statements to determine the highest

YDOXH <RX PD\ DOVR XVH WKH HQWLW\¶V ZHEVLWH WR

determine the highest value. You are encouraged to

keep a record of where you found the reported value.

1RWH WKDW IRU DQ DVVXPLQJ R^FH VWDWHPHQW \RX PXVW

report the value of the stock on the date you assumed

R^FH

4 , DP WKH VROH RZQHU RI P\ EXVLQHVV DQ 6 &RUSRUDWLRQ

, EHOLHYH WKDW WKH QDWXUH RI WKH EXVLQHVV LV VXFK WKDW LW  
cannot be said to have any "fair market value" because

LW KDV QR DVVHWV , RSHUDWH WKH FRUSRUDWLRQ XQGHU

an agreement with a large insurance company. My

contract does not have resale value because of its

QDWXUH DV D SHUVRQDO VHUYLFHV FRQWUDFW 0XVW , UHSRUW

the fair market value for my business on Schedule A-2

of the Form 700?

A. Yes. Even if there are no tangible DVVHWV LQWDQJLEOH

DVVHWV VXFK DV UHODWLRQVKLSV ZLWK FRPSDQLHV DQG

FOLHQWV DUH FRPPRQ\ VROG WR TXDOL¿HG SURIHVVLRQDOV

7KH ³IDLU PDUNHW YDOXH´ LV RIWH[à€•€ p0@p€ RZ0 SOG WÉÍà€•€ W~p@ LR

Questions and Answers  
Continued

4 , DP VROH RZQHU RI D SULYDWH ODZ, SUDFWLFLH WKD OWDQV QRP P\ JUDQGID  
reportable based on my limited disclosure category. KRPH , V WKLV ORDQ UHSRUWDEOH"  
+RZHYHU VRPH RI WKH VRXUFHV RI LQFRPH WR P\ ODZ  
SUDFWLFLH DUH IURP UHSRUWDEOH VRXUFHV R , KDYH WR  
disclose this income? A. No. Loans received from family members are not reportable.

\$ <HV HYHQ WKRXJK WKH ODZ SUDFWLFLH LV QRW UHSRUWDEOH  
reportable sources of income to the law practice of 4 ODQ\ \HDUV DJR , ORDQHG P\ SDUHQ  
RU PRUH PXVW EH GLVFORVHG GRDQV LQIRUPDWLRQ\ SDLG EDFN WK  
would be disclosed on Schedule C with a note in the report this loan repayment on my Form 700?  
"comments" section indicating that the business entity A. No. Payments received on a loan made to a family  
is not a reportable investment. The note would be for member are not reportable.  
LQIRUPDWLRQDO SXUSRVHV RQO\ LW LV QRW D UHTXLUHPHQW

4 , DP WKH VROH RZQHU RI P\ EXVLQHVV 5HDO 3URSHUW\ 'LVFORVXUH  
disclose my income - on Schedule A-2 or Schedule C? Q. During this reporting period we switched our principal  
SODFH RI UHVLGHQFH LQWR D UHQWD  
A. Sources of income to a business in which you have an  
RZQHUVKLS LQWHUHVST RI RU JUHDWHU DUH GLVFORVHG RQ  
6FKHG XOH \$ 6HH 5HIHUHQFH 3DPSKOHW SDJH

4 0\ KXVEDQG LV D SDUWQHUV LQ D IRXU SHUVRQ ;UP ZKHUH  
all of his business is based on his own billings and  
FROOHFWLRQV IURP YDULRXV FOLHQWV +RZ GR , UHSRUW P\  
community property interest in this business and the  
income generated in this manner?

\$ , I \RXU KXVEDQG V LQYHVWPHQW LQ WKH ;UP LV RU  
JUHDWHU GLVFORVH RI KLV VKDUH RI WKH EXVLQHVV  
RQ 6FKHG XOH \$ 3DUW DQG RI KLV LQFRPH RQ  
6FKHG XOH \$ 3DUWV DQG )RU H[DPSOH D FOLHQW RI  
\RXU KXVEDQG V PXVW EH D VRXUFH RI DW OHDVW  
GXULQJ WKH UHSRUWLQJ SHULRG EHIRUH WKH FOLHQW V QDPH LV  
reported.

4 +RZ GR , GLVFORVH P\ VSRXVHV V RU UHJLVWHUHG GRPHVWLF  
SDUWQHUV V DODU\  
A. Report the name of the employer as a source of income  
on Schedule C.

4 , DP D GRFWRU )RU SXUSRVHV RI UHSRUWLQJ  
VRXUFHV RI LQFRPH RQ 6FKHG XOH \$ 3DUW DUH WKH  
patients or their insurance carriers considered sources  
of income?

\$ , I \RXU SDWLHQWV H[HUFLVH VX^FLHQW FRQWURO E\ VHOHFWLQJ  
\RX LQVWHDG RI RWKHU GRFWRUV WKHQ \RXU SDWLHQWV UDWKHU  
WKDQ WKHLU LQVXUDQFH FDUULHU DUH VRXUFHV RI LQFRPH WR  
\RX 6HH 5HIHUHQFH 3DPSKOHW SDJH

## Gift Disclosure

Q.