City of Albuquerque Financial Disclosure Report

General Instructions for Completing the CC Financial Disclosure Report

Who Should Use This Form?

Candidates, Elected Officials, and Department Directors: must submit a Financial Disclosure Report in accordance with the requirements outlined in City Charter, Article XII and Article XIII.

When Must I File?

Elected Officials and Department Directors: This annual financial disclosure report is due to the City Clerk's Office on the **first city workday of July each year** you serve. Newly Elected Officials must file an annual financial disclosure report detailing any changes or additions to the information submitted with their declaration of candidacy, as required by Section 3 of the Election Code. Department Directors must file this report **for the preceding year** when they begin their position.

Candidates: The candidate disclosure report is due when the candidate becomes a declared candidate.

The Cover Page of the City of Albuquerque Financial Disclosure Report contains the following information:

1. Filer's Full Name

2. Filer's Spouse's Full Name

3. Filer's Certification: By signing the report, the filer certifies that the information contained in the report is true, complete, and correct to the filer's knowledge. The digital signature should appear on the form.

Warnings

Falsification of information, or failure to file or report information as required by Article XII and Article XIII of the City Charter, may subject you to a civil monetary penalty and to disciplinary action by the Board of Ethics. Falsification of information required to be filed by Article XII and Article XIII of the City Charter my also subject you to criminal prosecution.

Instructions for Completing Part 1 of the CC Financial Disclosure Report: Filer's and Filer's Spouse's Employment

Charter of the City of Albuquerque, art. XII, §5(e)(2); art. XIII, §3(2).

Applicability: All filers must complete Part 1.

Reporting Period: The preceding calendar year.

Reporting Requirement:

Report any positions that you or your spouse held at any time during the reporting period. As an example, reportable positions include those of an officer, director, trustee, general partner, proprietor, representative, employee, or consultant of any for-profit or non-profit organization (whether compensated or uncompensated)

Completing the Fields:

Organization Name: Provide the name of the organization.

Address: Provide the full address in which the organization is located.

Organization Type: Brief description of the nature of the business or occupation.

Position Held: Provide the title or a brief functional description of the position you hold or held.

From: Provide the month and year in which service in the position began.

To: Provide the month and year in which the position ended. If you still hold the position, write "present."

Nothing to Report: If you do not have anything to report, write "None."

Instructions for Completing Part 2 of the CC Financial Disclosure Report: Real Property

The Charter of the City of Albuquerque, art. XII, §5(e)(3); art. XIII, §3(3).

Applicability: All filers complete Part 2.

Reporting Period: The preceding calendar year.

Reporting Requirement:

Report all real property owned by you, your spouse, and your dependent children over the age of 18.

For reported real property, the identity, zip code, and purpose of each real property must be disclosed. In the absence of a zip code, the county of situs of the personal residence must be disclosed.

Completing the Fields:

Address: Provide the zip code, or, in the absence of a zip code, the county of situs is required to be disclosed.

Held By: Select whether the Real Property is owned by the Filer, the Filer's Spouse, or the Filer's Dependent Child over the age of 18.

Purpose: Provide a brief description of the purpose for each Real Property.

Note: This is a blank field for any additional comments the filer would like to add to the disclosure. In the absence of a zip code for personal residence, this field can be used to notate the County of the Real Property.

Nothing to Report: If you do not have anything to report, write "None."

Instructions for Completing Part 3 of the CC Financial Disclosure Report: Assets (other than real property)

Charter of the City of Albuquerque, art. XII, §5(e)(4); art. XIII, §3(4).

Applicability: All filers must complete Part 3.

Reporting Period: The preceding calendar year.

Reporting Requirement:

Report assets of more than fifty thousand dollars ($50,000) directly or beneficially owned by the filer, filer's spouse, and filer's dependent children’s, over the age of 18.When determining whether an asset meets this threshold, do not reduced the asset’s value by any debt secured by it, such as a mortgage or other secured loan. If the exact value is unknown or not easily obtainable, a good faith estimate of the fair market value is acceptable.

Types of Reportable Assets
Assets that must be disclosed:

- Commodities, including the type of commodity;
- Investments in stocks, bonds, futures contracts, options, derivatives, currency;
- Real estate investments, trusts, mutual funds, private equity funds, exchange-traded funds;
- Trust funds of which the filer is a beneficiary;
- Contractual rights that are reasonably likely to generate future income, such as royalties and intellectual property

If an investment is part of a fund, the filer must disclose the fund’s name, the fund manager and any underlying holdings within the fund that have a value of more than fifty thousand ($50,000) dollars.

Contractual Rights Disclosure:
For contractual rights expected to generate future income, such as royalties or intellectual property, disclose:

- The names of the contracting parties; and
- The purpose of the contract.

Completing the Fields:

Types of Assets:
Disclose assets owned directly or beneficially by the filer, the filer’s spouse, or the filer’s dependent children, over the age of 18 if their value exceeds fifty thousand dollars ($50,000).
Reportable assets include:

- Commodities (specify the type of commodity);
- Investments (e.g., stocks, bonds, futures contracts, options, derivatives, currency, real estate investment trusts, mutual funds, private equity funds, exchange-traded funds);
- Trust funds of which the filer is a beneficiary; and
- Contractual rights that are reasonably likely to generate future income, such as royalties or intellectual property (include the names of the contracting parties, and purpose of the contract).

Description of Assets:
Provide enough detail to clearly identify the asset or its source being reported. The level of detail will depend on the type of asset or income being disclosed.
(1) **Stock**: Include the name of the issuing company. For privately held stock, describe the issuer’s business. For publicly traded stocks, include the ticker symbol, if available. (e.g., stocks held in an IRA or 401K).

(2) **Other Named Assets (e.g., bonds and mutual funds)**: Provide the full name of the asset and, unless clear from the name, describe the type of asset. For publicly traded securities, include the ticker symbol if available.

Unnamed Assets: For assets without specific names (e.g., artwork or collectables), provide general description and enough detail to convey their nature or purpose (.e.g., a painting worth more than $50,000 may be disclosed as “artwork”).

Owned By: Report whether the disclosure is for the filer, the filer's Spouse, or the filer's dependent children over the age of 18.

Assets That Are Not Reportable:
Assets of $50,000 or less do not need to be reported. Additionally, one passenger vehicle registered to the filer, the filer’s spouse, and the filer's dependent children over the age of 18 is exempt from disclosure but second vehicles must be reported.

Nothing to Report: If you do not have anything to report, write "None."

Instructions for Completing Part 4 of the CC Financial Disclosure Report: Income

Charter of the City of Albuquerque, art. XII, §5(e)(5); art. XIII, §3(5).

Applicability: All filers must complete Part 4.

Reporting Period: The preceding calendar year.

Reporting Requirement:

Report all sources of income equal to or greater than the threshold set by the internal revenue service pursuant to **26 U.S.C Section 6041(a)**, as amended. This includes income earned or received directly or indirectly accrued by the filer, the filer's spouse, or the filer's dependent children over the age of 18, except for income below $50,000 accrued by such dependent children.

Confidential Income Sources

1. If the income source is protected by legal or professional duty of confidentiality and has not been disclosed to a public agency, identify the source as "**confidential**" and describe the duty of confidentiality that preventing disclosure.
2. If an indirect income source is a client of a business entity of which the filer or the filer's spouse is a member, disclosure is not required when the spouse or the filer had no role in any matter involving that client.

Unearned Income:
Disclose sources of unearned income, including but not limited to:

- Taxable interest
- Capital gains
- Dividends
- Annuities
- Trust distributions
- Rents from real property
- Insurance policies.

Completing the Fields:

Description: Provide a clear description of the income source, specifying whether it is earned or unearned income.

Income Type: Indicate the type of income, such as the type of earned income, indirect income, or unearned income (e.g., salary, consulting fees, dividends, interest, capital gains, royalties, trust distributions, rents from real property and insurance policies, etc.).

Nothing to Report: If you do not have anything to report, write "None."

Definitions:

Income: The money or other form of payment that a person receives from labor or services, including from employment, a business entity, contract, goods, or services rendered and investments.

Instructions for Completing Part 5 of the CC Financial Disclosure Report: Liabilities

Charter of the City of Albuquerque, art. XII, §5(e)(6)-(8); art. XIII, §3(6)-(8).

Applicability: All filers must complete Part 5.

Reporting Period: The preceding calendar year.

Reporting Requirement:

Liabilities of more than **five thousand dollars ($5,000)** owed by the filer, the filer's spouse, or the filer's dependent children over the age of 18. For each liability, include the name of the debtor (who owes the liability), the creditor (to whom the debt is owed), the amount of the debt or liability, and any payments on the debt or liability during the previous calendar year.

Exemptions:
The disclosure is **not required** for ordinary consumer debt, mortgage debt on the primary residence of the filer, the filer's spouse, or the filer's dependent children (over the age of 18), student loans, or liabilities owed to the parents, grandparents, children or siblings of the filer, the filer's spouse, or the filer's dependent children (over the age of 18). Additionally, one passenger vehicle registered to the filer, the filer’s spouse, and the filer's dependent children over the age of 18 is exempt from disclosure but second vehicles must be reported.

Completing the Fields:

Creditor Name: The person to whom the debt or liability is owed.

Type: The type of debt or liability owed.

Amount: The amount, in range, of the debt or liability owed.

Payments Made: The amount of payments made in the preceding calendar year on the debt or liability.

Owed By: Report who owns the debt or liability: the filer; the filer's spouse; the filer's dependent children over the age of 18; or a trust of which the filer, filer’s spouse or filer’s dependent children over the age of 18 is a beneficiary.

Note: This space can be used for any additional information regarding the debt or liability.

Nothing to Report: If you do not have anything to report, write "None."

Instructions for Completing Part 6 of the CC Financial Disclosure Report: Privately Held Businesses

Charter of the City of Albuquerque, art. XII, §5(e)(9); art. XIII, §3(9).

Applicability: All filers complete Part 6.

Reporting Period: The preceding calendar year.

Reporting Requirement:

For any privately held business controlled by the filer, the filer's spouse, or the filer's dependent children over the age of 18, disclose the following information:

- The name of the business entity;
- A brief description of the nature of the business's activities; and
- The geographic location of the business including the city and state.

If the privately held business was formed for the purpose of holding investments additional disclosures are required:

1. **Assets**: Disclose any assets valued at more than fifty thousand dollars ($50,000) or that generated income equal to or greater than the reporting threshold set by the internal revenue service pursuant to **26 U.S.C. Section 6041(a)**, as amended; provided that in determining whether an asset has a value of more than fifty thousand dollars ($50,000), the value should not be reduced by any debt secured by the asset, such as a mortgage or other secured loan; and
2. **Liabilities:** Disclose any liabilities exceeding fifty thousand dollars ($50,000) including:
   - The name of the business entity that owes the debt or liability;
   - The person to which the debt or liability is owned;
   - The amount of the debt or liability; and
   - Any payments on the debt or liability during the previous calendar year.

Completing the Fields:

Business Name: Name of the reported Business.

City/State: The City and State where the business is registered to do business.

Description of Business Activity: A brief description of the nature of the business activities.

Held By: Report if the privately held business is held by the filer, the filer's spouse, or the filer's dependent children over the age of 18.

Holds Investments: Is the business formed for the purpose of holding investments? If yes, please report the following:

1. Assets of Investment Holding Business: If the business was formed for the purpose of holding investments, does the business hold any asset greater than fifty thousand dollars ($50,000.00)? If yes, the assets must be reported.

2. Liabilities of Investment Holding Business: If the business was formed for the purpose of holding investments, does the business hold any debt or liabilities greater than fifty thousand dollars ($50,000.00)? If yes, report the following information:
   a. Owner of Debt/Liability: Report the person to which the debt or liability is owned.

   b. Payments on Debt/Liability: Report any payments on the debt or liability during the previous calendar year.

Nothing to Report: If you do not have anything to report, write "None."

Instructions for Completing Part 7 of the CC Financial Disclosure Report: Professional Licenses/Memberships

Charter of the City of Albuquerque, art. XII, §5(e)(10); art. XIII, §3(10).

Applicability: All filers complete Part 7.

Reporting Period: The preceding calendar year

Reporting Requirement:

Report professional licenses held by the filer and the filer's spouse. Additionally, report any board membership, **City Council committees**, offices or other positions held by the filer and the filer's spouse in any corporations, partnerships, trusts or other for-profit businesses, nonprofit organizations, educational organizations, political organizations or other nongovernmental organizations. **Memberships in which you do not serve as an officer or hold a position, do not need to be disclosed.**

***Exceptions:**
You are not required to report: (1) positions with religious, social, fraternal, or political entities; (2) positions solely of an honorary nature; (3) mere membership in an organization; and (4) passive investment interests as a limited partner or non-managing member of a limited liability company.

In addition, you do not need to report service as a member of an advisory board or committee if the following criteria are met: (1) the advisory board or committee that belongs to a non-profit or governmental organization; (2) your service is unpaid; (3) you have no fiduciary duties (e.g. those held by officers, directors, or trustees); and (4) your role does not create an employee-employer relationship under common law.

Completing the Fields:

<u>Organization Name:</u> The name of the Organization the filer or the filer's spouse holds a position.

<u>City/State:</u> The City and State where the Organization is registered.

<u>Organization Type:</u> The type of Organization (ex: corporation, partnership, trust, nonprofit, education, political, nongovernmental, etc.)

<u>Position Held:</u> The position within the Organization held by the filer or the filer's spouse.

<u>Dates Position Held:</u> The dates (years to - from) the filer or the filer's spouse have held this reported position.

<u>Held By:</u> Report if the position held by the filer or the filer's spouse.

Nothing to Report: If you do not have anything to report, write "None."

Instructions for Completing Part 8 CC Financial Disclosure Report: Gifts

Charter of the City of Albuquerque, art. XII, § 5(e)(11); art. XIII, §3(11).

Applicability: All filers complete Part 8.

Reporting Period: The preceding calendar year.

Reporting Requirement:

Disclose any gift received in the prior calendar year by the filer, the filer's spouse, and the filer's dependent children over the age of 18, if the gift's market value greater than fifty dollars ($50.00) and it was given by:

- A registered lobbyist;
- A lobbyist's employer;
- A government contractor; or
- A person who has responded to a City-issued request for proposal (RFP) or an invitation to bid.

Completing the Fields:

Source: The name of the person, organization or business who gave the gift.

City/State: The city and state where the gifter resides, or where the business or organization is registered.

Brief Description and Recipient: A brief description of the gift as well as whether the intended recipient of the gift is the filer, the filer's spouse, or the filer's dependent children over the age of 18.

Nothing to Report: If you do not have anything to report, write "None."

Prohibitions:
No Official may receive a gift of value, whether in the form of service, loan, thing, or promise, from: (A) an employee of or applicant for employment with the City; (B) a person, firm, or corporation that an official knows is interested either directly or indirectly in any matter involving City business and the official is employed by the person, firm, or corporation or is a member of the firm or corporation; or (C) an unidentified donor.

Definitions are on the following page.

Generally, filers report gifts and travel reimbursements as

follows: **Yes, it's a gift but reportable:**

- Meets definition of Gift; and
- Valued over $50; and
- Is given to the official, the officials spouse, or dependent child over the age of 18; and
- From a restricted donor, a registered lobbyist, a lobbyist employer, a government contractor, or a person who has responded to an RFP or RFB.

Yes a gift but not reportable:

- Does not meet the definition (see the next page) of a gift such as salary, a donation, honorarium, award, use of public facility, etc.
- The gift is a contribution to support the filer's election campaign and has been reported on a report of contributions filed pursuant to the Election Code.

Instructions for Completing Part 8 CC Financial Disclosure Report: Gifts

Definitions:

Charter of the City of Albuquerque, art. XII, §5(k)

"Gift" or "Valuable Gift": means that which is directly or indirectly **paid** or **given** to another for an individual's **benefit** or by any other means for which **consideration** equal or greater than **fair market value** was not given by the **official** within **90 days** of the official's receipt of such gift, including, but not limited to **(1) real property**, **(2)** the **use of real property**, **(3) tangible or intangible personal property, (4) the use of tangible personal property, (5) a preferential rate** or terms on a **debt, loan, goods, or services**, which rate is below the **customary rate** and is neither a **government rate** nor a rate available to similarly situated members of the public by virtue of **occupation, affiliation, age, religion, sex, or national origin, (6) debt forgiveness** of an **indebtedness, (7) transportation**, other than that provided to an official by a **governmental agency** in relation to **approved government business, lodging** or **parking, (8) food or beverage, (9) membership dues**, other than dues paid by a **city agency, (10) entrance fees, admission fees, or tickets** to events, performances, or facilities other than those **hosted, sponsored, or co-sponsored** by the city or occurring at a **city facility, (11) plants, flowers, or floral arrangements, (12) services provided** by persons pursuant to a **professional license or certificate, (13) other personal services** for which a **fee is normally charged** by the person providing the services and **(14) any other similar service or thing** having an **attributable value** not already provided for in this section. For purposes of calculating the **dollar limits** to the term **"gift,"** any gift provided by a **lobbyist** shall be attributed to the lobbyist individually as well as to the **business organization** which he or she owns or by which he or she is employed.

[Items That Are Not Reportable:]

Gift does <u>not</u> include: (1) salary, benefits, services, fees, commissions, returns on an investment, a loan, interest incurred on a bond, expenses, or other forms of compensation associated primarily with the official's employment, business or service as an officer or director of a private corporation or organization; **(2)** any activity authorized by the **Election Code**, the **Code of Ethics**, and items excluded from the definition of **"contributions"** pursuant to Section 2(g)(3) of the Election Code, including but not limited to the acceptance of a donation, transfer or contribution, or the making of an expenditure or reimbursement; **(3)** an **honorarium** or an expense related to an honorarium event paid to an official or the official's spouse; **(4)** an **award**, plaque, certificate, or similar personalized item given in recognition of the official's **public, civic, charitable, or professional** service; **(5)** an honorary membership in a service or fraternal organization presented merely as a courtesy by such organization; **(6)** the use of a **public facility** or **public property** made available by a governmental agency for a public purpose; **(7)** transportation provided to an official by a governmental agency in relation to **official and approved governmental business, (8)** gifts provided directly or indirectly by a **state, regional or national organization** whose primary purpose is the **promotion of the exchange of ideas between governmental officials or employees** or to provide for the **professional development or training** of such governmental officials or employees, provided that such organization has a membership primarily composed of elected or appointed public officials or employees; **(9)** the use of a **city facility** by an official; **(10)** a gift motivated by a **familial or close personal relationship** rather than the recipient's position as an official; and **(11)** all **non-pecuniary things or services** donated in any twelve **(12)** month period from a single donor that have a **cumulative fair market value of two hundred fifty dollars ($250.00)** or less.

Definitions Continued:

Section 10-16B-2 NMSA 1978

The Gift Act defines a **"restricted donor"** as **"a person who: (1)** is or is seeking to be a party to any one or any combination of **sales, purchases, leases or contracts** to, from or with the **agency** in which the **donee** holds office or is employed; **(2)** will **personally** be, or is the **agent** of a person who will be, **directly and substantially affected financially** by the performance or nonperformance of the **donee's official duty** in a way that is greater than the effect on the **public generally** or on a **substantial class of persons** to which the person belongs as a member of a **profession, occupation, industry or region; (3)** is personally, or is the agent of a person who is, the **subject** of or party to a **matter** that is **pending** before a **regulatory agency** and over which the **donee** has **discretionary authority** as part of the donee's **official duties** or **employment** within the regulatory agency; or **(4)** is a **lobbyist** or a **client of a lobbyist** with respect to **matters** within the **donee's jurisdiction.**

City Clerk Financial Disclosure Report

Report Type:	
Year:	

City of Albuquerque Financial Disclosure Report

Filer's Information				
Last Name	First Name	MI	Position	Agency
Filer's Spouse Full Name (if any)				

☐ I have no changes to report from the last reporting period.	☐ Filer's Certification: By checking the box and typing my name as my electronic signature, I certify under penalty of perjury that the statements I have made in this report are true, complete, and correct to the best of my knowledge. Signature:	Date:

Instructions for Completing the Financial Disclosure Form:

This is a fillable form that works best when opened in Adobe Acrobat, Apple Preview, Edge or Chrome. These programs allow you to easily type in your information and select options from drop-down menus. Drop-down menu boxes are highlighted with a dark blue outline. Please review all drop-down options carefully to make sure you select the correct information.

If you prefer, you may print the form and fill it out by hand. However, you should still check the drop-down menus before printing to make sure you understand all available options.

Make sure all sections are completed before submitting the form.

Instructions for Part 1

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

Filer's Name	Page Number

Part 1: Filer's and Filer's Spouse Positions (Employment) Held

#	Organization Name	City/State	Organization Type	Position Held	From	To	Held By
1.							
2.							
3.							
4.							
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20.							

Instructions for Part 2

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

Filer's Name	Page Number

Part 2: Real Property Held by Filer, Filer's Spouse or 18+ Dependent Children.

	Address of Real Property with Zip Code	Held by	Purpose of Use	Note
1.				
2.				
3.				
4.				
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Instructions for Part 3

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

Filer's Name	Page Number

Part 3: Assets (greater than $50,000) of the Filer, Filer's Spouse, or Filer's 18+ Dependent Children				
#	Name of Asset	Asset Owned By	Type of Asset	Note or Description of Asset
1.				
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6.				
7.				
8.				
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Instructions for Part 4

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

Filer's Name	Page Number

Part 4: Income of the Filer, Filer's Spouse, or Filer's 18+ Dependent Children, except for income below $50,000 accrued by such dependent children

#	Income Source	Income Received By	Type of Income	Note or Description of Income
1.				
2.				
3.				
4.				
5.				
6.				
7.				
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Instructions for Part 5

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

Filer's Name	Page Number

Part 5: Liabilities (greater than $5,000) owed by the Filer, Filer's Spouse, or the Filer's 18+ Dependent Children

#	Creditor Name	Type	Amount	Payment Made	Owed By	Note
1.						
2.						
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Instructions for Part 6

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

Filer's Name	Page Number

Part 6: Filer's, Filer's Spouse, or 18+ Dependent Children's Privately Held Businesses

#	Business Name	City/State	Brief Description of Business Activities			Held By	Holds Investment
1.							
	Liabilities	Amount Owed	Owner of Liabilities	Amount Paid on Liability/Debt	Assets	Description of Assets	
	Business Name	City/State	Brief Description of Business Activities			Held By	Holds Investments
2.							
	Liabilities	Amount Owed	Owner of Liabilities	Amount Paid on Liability/Debt	Asset	Description of Assets	
	Business Name	City/State	Brief Description of Business Activities			Held By	Holds Investments
3.							
	Liabilities	Amount Owed	Owner of Liabilities	Amount Paid on Liability/Debt	Asset	Description of Assets	
	Business Name	City/State	Brief Description of Business Activities			Held By	Holds Investments
4.							
	Liabilities	Amount Owed	Owner of Liabilities	Amount Paid on Liability/Debt	Asset	Description of Assets	
	Business Name	City/State	Brief Description of Business Activities			Held By	Holds Investments
5.							
	Liabilities	Amount Owed	Owner of Liabilities	Amount Paid on Liability/Debt	Asset	Description of Assets	

**Part 6 continues on next page if needed.*

Instructions for Part 6

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

Filer's Name	Page Number

Part 6: Filer's, Filer's Spouse, or 18+ Dependent Children's Privately Held Businesses

#	Business Name	City/State	Brief Description of Business Activities			Held By	Holds Investment
6.							
	Liabilities	**Amount Owed**	**Owner of Liabilities**	**Amount Paid on Liability/Debt**	**Assets**	**Description of Assets**	
	Business Name	**City/State**	**Brief Description of Business Activities**			**Held By**	**Holds Investments**
7.							
	Liabilities	**Amount Owed**	**Owner of Liabilities**	**Amount Paid on Liability/Debt**	**Asset**	**Description of Assets**	
	Business Name	**City/State**	**Brief Description of Business Activities**			**Held By**	**Holds Investments**
8.							
	Liabilities	**Amount Owed**	**Owner of Liabilities**	**Amount Paid on Liability/Debt**	**Asset**	**Description of Assets**	
	Business Name	**City/State**	**Brief Description of Business Activities**			**Held By**	**Holds Investments**
9.							
	Liabilities	**Amount Owed**	**Owner of Liabilities**	**Amount Paid on Liability/Debt**	**Asset**	**Description of Assets**	
	Business Name	**City/State**	**Brief Description of Business Activities**			**Held By**	**Holds Investments**
10.							
	Liabilities	**Amount Owed**	**Owner of Liabilities**	**Amount Paid on Liability/Debt**	**Asset**	**Description of Assets**	

Instructions for Part 7

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

Filer's Name	Page Number

Part 7: Filer's and Filer's Spouse/Partner's Memberships and Positions in Professional Organizations

#	Organization Name	City/State	Organization Type	Position Held	Dates Position Held	Held By
1.						
2.						
3.						
4.						
5.						
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12.						
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19.						
20						

Instructions for Part 7

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

Filer's Name	Page Number

Part 8: Gifts Given to Filer, Filer's Spouse, or Filer's 18+ Dependent Children

#	Source Name	City/State	Brief Description and Recipient
1.			
2.			
3.			
4.			
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