



FORM EC-700

MID-YEAR DISCLOSURE OF REPORTABLE GIFTS

Official Use Only

FILING YEAR: 20____

Check Box if an Amendment

Type or print in ink

1. NAME and TELEPHONE NUMBER

First and Last Name

Telephone Number

2. MAILING ADDRESS (may use business address)

Street Address

City

State

Zip Code

3. OFFICE HELD

(Check one box)

- Mayor
- Councilmember
- City Attorney

4. CERTIFICATION (Check one box)

- No Disclosure Required: I have not received any reportable gifts from January 1 through June 30 of this year.
- Disclosure Required: I have received one or more reportable gifts from January 1 through June 30 of this year, and have disclosed the receipt of all such gifts on this Form EC-700.

5. VERIFICATION

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge that this is a public document. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date _____
(month, day, year)

Signature _____

File the original signed statement with the City Clerk by July 31.

Gifts identified on this Form EC-700 must be carried over to your next Form 700 – Statement of Economics Interest (either your annual statement due by April 1 of next year, or your leaving office statement).

FORM EC-700 INSTRUCTIONS

A gift is anything of value for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts totaling \$50 or more received during the reporting period from a single source must be reported.

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. As a general rule, you must report a gift even if you never used it or you gave it away to another person.

If the exact amount of a gift is unknown, make a good faith estimate of the item's fair market value. Listing the value of a gift as "over \$50" or "value unknown" is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary.

Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official City business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public
- Wedding gifts
- An honorarium received prior to assuming office
- Transportation and lodging
- Forgiveness of a loan received by you
- Travel payments, i.e., transportation, lodging, and meals

You are not required to disclose:

- Gifts that were not used and that, within 30 days after receipt, were returned to the donor or delivered to a 501(c)(3) charitable organization or government agency without being claimed by you as a charitable contribution for tax purposes.
- Gifts from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, and certain other family members (contact the Ethics Commission for a complete list). The exception does not apply if the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of similar value exchanged between you and an individual, other than a lobbyist, in the course of an ongoing social relationship.

- Gifts of informational material provided to assist you in the performance of your official duties (e.g., books, pamphlets, reports, calendars, periodicals, or educational seminars).
- Hospitality provided by someone in their home if the host is present and you have a relationship, connection, or association with the host unrelated to your City position.
- A monetary bequest or inheritance.
- Personalized plaques or trophies with an individual value of less than \$250.
- Campaign contributions.
- Up to two tickets to attend a fundraiser for a candidate, campaign committee, or 501(c)(3) non-profit organization. The tickets must be received from the entity holding the fundraiser.
- Gifts given to members of your immediate family if the source has an established working or social relationship with the family member unless the source (a) is a lobbyist, or (b) is involved in a decision in which it was foreseeable that you would participate, or in which you did participate during the 12 months prior to receiving the gift.
- Any other payment not identified above, that would otherwise meet the definition of gift, where the payment is made by an individual who is not registered to lobby the City, where it is clear that the gift was made because of an existing personal or business relationship unrelated to your official position and there is no evidence whatsoever at the time the gift is made to suggest the donor had a purpose to influence you.
- Travel payments received from a state, local, or federal government agency for education, training, or other interagency programs.
- A travel payment received from a 501(c)(3) non-profit organization for which you provided equal or greater consideration.

Completing the Form EC-700

Identify on the first schedule all reportable gifts (other than travel payments) received between January 1 and June 30. These gifts must be carried over to Schedule D of your next full Form 700.

Identify on the second schedule all travel payments that are reportable as gifts and were received between January 1 and June 30. You are not required to report travel payments that qualify as "income" on this Form EC-700. Travel payments that are "income" must be disclosed on Schedule E of your next full Form 700, along with the travel payments that are being reported on this EC-700 as gifts.

Gifts (other than travel payments)

Disclosures made below should be carried over to your next annual Form 700 - Schedule D.

<p>▶ NAME OF SOURCE <i>(Not an Acronym)</i></p> <p>_____</p> <p>ADDRESS <i>(Business Address Acceptable)</i></p> <p>_____</p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE</p> <p>_____</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;">DATE (mm/dd/yy)</th> <th style="text-align: left; border-bottom: 1px solid black;">VALUE</th> <th style="text-align: left; border-bottom: 1px solid black;">DESCRIPTION OF GIFT(S)</th> </tr> </thead> <tbody> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> </tbody> </table>	DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	___/___/___	\$ _____	_____	___/___/___	\$ _____	_____	___/___/___	\$ _____	_____	<p>▶ NAME OF SOURCE <i>(Not an Acronym)</i></p> <p>_____</p> <p>ADDRESS <i>(Business Address Acceptable)</i></p> <p>_____</p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE</p> <p>_____</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;">DATE (mm/dd/yy)</th> <th style="text-align: left; border-bottom: 1px solid black;">VALUE</th> <th style="text-align: left; border-bottom: 1px solid black;">DESCRIPTION OF GIFT(S)</th> </tr> </thead> <tbody> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> <tr> <td>___/___/___</td> <td>\$ _____</td> <td>_____</td> </tr> </tbody> </table>	DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	___/___/___	\$ _____	_____	___/___/___	\$ _____	_____	___/___/___	\$ _____	_____
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Comments: _____

Gifts (Travel Payments)

- Disclosures made below should be carried over to your next annual Form 700 - Schedule E.
- Mark the "501(c)(3)" box for a travel payment received from a nonprofit 501(c)(3) organization or the "Speech" box if you made a speech or participated in a panel. These payments are not subject to the gift limit, but may result in a disqualifying conflict of interest.

<p>▶ NAME OF SOURCE <i>(Not an Acronym)</i></p> <hr/> <p>ADDRESS <i>(Business Address Acceptable)</i></p> <hr/> <p>CITY AND STATE</p> <hr/> <p><input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE</p> <hr/> <p>DATE(S): ___/___/___ - ___/___/___ AMT: \$ _____</p> <p><input type="radio"/> Made a Speech/Participated in a Panel</p> <p>Identify Travel Destination</p> <hr/> <hr/>	<p>▶ NAME OF SOURCE <i>(Not an Acronym)</i></p> <hr/> <p>ADDRESS <i>(Business Address Acceptable)</i></p> <hr/> <p>CITY AND STATE</p> <hr/> <p><input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE</p> <hr/> <p>DATE(S): ___/___/___ - ___/___/___ AMT: \$ _____</p> <p><input type="radio"/> Made a Speech/Participated in a Panel</p> <p>Identify Travel Destination</p> <hr/> <hr/>
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