

# STATEMENT INSTRUCTIONS

## TO COMPLETE STATEMENT:

*A separate Statement must be completed for each source of Income. For example, if during the Reporting Period, you earned Income as the sole proprietor of ABC Interior Designs and as an instructor at Evergreen Community College District, please provide two separate statements for ABC Interior Designs and Evergreen Community College District, respectively. Do not attach any documentation unless otherwise specified.*

- Enter the name, and daytime telephone number in the spaces provided. Because the Income and Time Disclosure Statement is a document available for public review, you may list your business/office telephone number instead of your home number.

- Enter the Reporting Period to which the Statement applies.
- Disclose the number of hours you have spent this Reporting Period (i.e. in the previous three months or quarter) on services unrelated to your duties of office for which you earned Income.

**The first Reporting Period includes only the month of September, 2006.**

## Section 1. Definition of Income:

Payment for services that you rendered that are unrelated to your duties as Mayor or Councilmember, are reportable. Examples include salary, wages, tips, professional fees, commissions, contingency fees, success fees, bonuses or awards. Payments such as stipends for serving as the Council's appointee on the board of another governmental agency are not reportable. Income of your spouse or domestic partner is not reportable. Payment is treated as Income when there is a legally enforceable right to the payment (i.e. when the services are provided).

- Check the box indicating the total Income earned from this Business Entity, Trust, or Governmental Agency this Reporting Period. If the aggregate Income from this source for this Reporting Year is less than \$500, skip the remaining sections and complete the verification in Part 5.

## Section 2. Reporting Aggregate Income:

If, in this Reporting Period, you have not earned any Income from or spent any time on services for a particular source, you may still be required to fill out a Statement for this Reporting Period if in this Reporting Year you have received an aggregate of \$500 or more from that source.

- Check the box indicating the total Income earned from this Business Entity, Trust, or Governmental Agency this Reporting Year. If you own a business as a sole proprietor, the income received by your business during the Reporting Period must be listed. Individual customers or clients are not listed here. See Section 4, "Reportable Single Source of Income."

## Section 3. Business Entity/Trust/Governmental Agency:

Disclose the name of the Business Entity, Trust, or Governmental Agency (e.g. sole proprietorship, partnership, LLC, corporation, trust, governmental agency, nonprofit organization) for whom you have rendered services.

- Provide a general description of the activity the Business Entity, Trust, or Governmental Agency is engaged in.
- Disclose the job title or business position you hold with the Business Entity, Trust, or Governmental Agency.
- Identify the nature of the services you provide to the Business Entity, Trust, or Governmental Agency.

## Section 4. Reportable Single Source of Income:

The name of the single source of Income for which your share is \$5,000 or more in either this Reporting Period or in the aggregate for this Reporting Year need not be reported until payment is received.

If you believe that the name of a single source of Income is protected by a legally recognized privilege or privacy interest, attach a separate document setting forth the basis for your assertion for each undisclosed name. As specifically as possible without defeating the privilege or privacy interest, state facts which demonstrate why revealing the name would violate the identified privilege or privacy interest. You must further state to the best of your knowledge that you will not make, participate in making, or in any way attempt to use an official position to influence a governmental decision related to the undisclosed source of Income if doing so would be a violation of the Political Reform Act (Gov. Code sections 81000-91015).

- List the name of each source of Income if your pro rata share of aggregate payments received from that source directly or through the Business Entity, Trust, or Governmental Agency is \$5,000 or more in this Reporting Period or in this Reporting Year. For example, if you own ABC Interior Designs and during the first Reporting Period, Bob Smith paid ABC Interior Designs \$2000 to redesign his house, then Bob Smith would not be listed in Section 4 of the Statement for the first Reporting Period. If Bob Smith then paid ABC Interior Designs \$4000 during the second Reporting Period for the redesign of his office, then the total income from Bob Smith for the Reporting Year would be \$6000. Bob Smith must be listed in Section 4 of the Statement for the second Reporting Period and in the Statements for the third and fourth Reporting Periods of the Reporting Year.

## Section 5. Verification:

- Complete the verification by signing the statement and entering the date signed. When you sign, you are stating, under penalty of perjury, that it is true and correct. **An unsigned Statement is not considered filed.**

Submit the originally signed Statement to the Filing Officer (City of San Jose City Clerk).