

Form 700 Filers
Statement of Economic Interests
**Schedule C: Income, Loans
and Business Positions**



PRESENTED BY
EXTERNAL AFFAIRS AND EDUCATION DIVISION
FAIR POLITICAL PRACTICES COMMISSION

Finding the Form 700

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www.fppc.ca.gov >

File a Form 700

Statement of Economic Interests



Form 700

A Public Document

Also available on the FPPC website:

- ***Form 700 in Excel format***
- *Reference Pamphlet for Form 700*

California Fair Political Practices Commission

Email Advice: advice@fppc.ca.gov

Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772

Telephone: (916)322-5660 • Website: www.fppc.ca.gov

Use Schedule C...

- if you or your spouse has income of at least \$500...
- from an entity that is reportable per your agency's conflict of interest code, or
- from an entity that does business in your jurisdiction, or
- if you have \$500 or more in loans from a private lender, or
- if you have an unpaid position in a reportable business entity.

SCHEDULE C Income, Loans, & Business Positions (Other than Gifts and Travel Payments)		CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION Name PAT CLARK
<p>▶ 1. INCOME RECEIVED</p> <p>NAME OF SOURCE OF INCOME RYDER TRANSPORT INC.</p> <p>ADDRESS (Business Address Acceptable) 708 WINTERS AVE, SACRAMENTO, CA</p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE MOVING COMPANY</p> <p>YOUR BUSINESS POSITION TECHNOLOGY ANALYST</p> <p>GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input checked="" type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)</p> <p><input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ <i>(Real property, car, boat, etc.)</i></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more</p> <p>_____ (Describe)</p> <p><input type="checkbox"/> Other _____ (Describe)</p>	<p>▶ 1. INCOME RECEIVED</p> <p>NAME OF SOURCE OF INCOME SAMANTHA WRIGHT</p> <p>ADDRESS (Business Address Acceptable) 421 MOON ST, SACRAMENTO, CA</p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE</p> <p>YOUR BUSINESS POSITION</p> <p>GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)</p> <p><input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input checked="" type="checkbox"/> Sale of CAR <i>(Real property, car, boat, etc.)</i></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more</p> <p>_____ (Describe)</p> <p><input type="checkbox"/> Other _____ (Describe)</p>	

Schedule C

Reportable Interests

- Gross salary/wages
- 50% of your spouse's income/wages
- Gross income from the sale of a house, car, etc.
- Rental income not reported on Schedule B
- Re-payment of loans made to others
- Honoraria received before becoming a public official

Schedule C

Non-Reportable Interests

- Governmental income (state, federal, local)
- Stock dividends and the sale of stock
- Income from PERS retirement account
- Cash bequest or inheritance
- Payments from an insurance policy, including an annuity
- Income earned by dependent children
- Alimony or child support payments
- Trade-in allowances from car dealers
- Loan repayments from certain family members
- Loans from commercial lending institutions
- Loans made to others
- Campaign contributions

Completing Schedule C

- Provide the name of the source of income.
- Enter the business address of the source, including city and state.
- Describe the business activity of the source.
- Note your business position at the entity.

SCHEDULE C Income, Loans, & Business Positions (Other than Gifts and Travel Payments)		CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
		Name PAT CLARK
<p>▶ 1. INCOME RECEIVED</p> <p>NAME OF SOURCE OF INCOME ERNST & YOUNG</p> <p>ADDRESS (Business Address Acceptable) 8565 MADISON AVE, SACRAMENTO, CA</p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE ACCOUNTING FIRM</p> <p>YOUR BUSINESS POSITION N/A</p> <p>GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input checked="" type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)</p> <p><input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ <i>(Real property, car, boat, etc.)</i></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ <i>(Describe)</i></p> <p><input type="checkbox"/> Other _____ <i>(Describe)</i></p>	<p>▶ 1. INCOME RECEIVED</p> <p>NAME OF SOURCE OF INCOME UNIVERSAL OUTDOOR CO.</p> <p>ADDRESS (Business Address Acceptable) 9563 CITY VIEW CT, SACRAMENTO, CA</p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE ONLINE CAMP EQUIPMENT RETAILER</p> <p>YOUR BUSINESS POSITION BOARD MEMBER</p> <p>GROSS INCOME RECEIVED <input checked="" type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)</p> <p><input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ <i>(Real property, car, boat, etc.)</i></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ <i>(Describe)</i></p> <p><input type="checkbox"/> Other _____ <i>(Describe)</i></p>	

Completing Schedule C

- If the position is unpaid, check the box to indicate that you received no income.
- If you gross \$500 or more, check the appropriate box to indicate your gross income.
- Check the appropriate box to indicate the reason you received the income.
- Fill in the blank provided if you have income to report for those options.

SCHEDULE C Income, Loans, & Business Positions (Other than Gifts and Travel Payments)		CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION Name PAT CLARK
<p>▶ 1. INCOME RECEIVED</p> <p>NAME OF SOURCE OF INCOME ERNST & YOUNG</p> <p>ADDRESS (Business Address Acceptable) 8565 MADISON AVE, SACRAMENTO, CA</p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE ACCOUNTING FIRM</p> <p>YOUR BUSINESS POSITION N/A</p> <p>GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input checked="" type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)</p> <p><input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.)</p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more</p> <p>_____ (Describe)</p> <p><input type="checkbox"/> Other _____ (Describe)</p>	<p>▶ 1. INCOME RECEIVED</p> <p>NAME OF SOURCE OF INCOME UNIVERSAL OUTDOOR CO.</p> <p>ADDRESS (Business Address Acceptable) 9563 CITY VIEW CT, SACRAMENTO, CA</p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE ONLINE CAMP EQUIPMENT RETAILER</p> <p>YOUR BUSINESS POSITION BOARD MEMBER</p> <p>GROSS INCOME RECEIVED <input checked="" type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)</p> <p><input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.)</p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more</p> <p>_____ (Describe)</p> <p><input type="checkbox"/> Other _____ (Describe)</p>	

Completing Schedule C

- Provide the name of any personal or non-commercial lenders.
- Enter the business address of the lender, including city and state.
- Check the box to indicate the highest balance of the loan during the reporting period.

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD		
<p>* You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:</p>		
NAME OF LENDER*	INTEREST RATE	TERM (Months/Years)
<u>NANCY TRAN</u>	<u>5</u> % <input type="checkbox"/> None	<u>36 MONTHS</u>
ADDRESS (Business Address Acceptable)	SECURITY FOR LOAN	
<u>1126 BRIDGE WAY, SACRAMENTO, CA</u>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Personal residence	
BUSINESS ACTIVITY, IF ANY, OF LENDER	<input type="checkbox"/> Real Property _____ <i>Street address</i>	
<u>FINANCIAL PLANNING</u>	_____	
HIGHEST BALANCE DURING REPORTING PERIOD	_____	
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> Guarantor _____	
<input type="checkbox"/> \$1,001 - \$10,000	_____	
<input checked="" type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> Other _____	
<input type="checkbox"/> OVER \$100,000	<i>(Describe)</i>	
Comments: _____		

Completing Schedule C

- Indicate the interest rate of the loan. If no interest is being charged, check the “None” box.
- Provide the full term of the loan, even if you have paid some of it
- Check the box to indicate the security used to guarantee the loan. If no security was required, check the box “None” box.
- Provide the requested information in the blanks as needed.

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD		
* You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:		
NAME OF LENDER*	INTEREST RATE	TERM (Months/Years)
<u>NANCY TRAN</u>	<u>5</u> % <input type="checkbox"/> None	<u>36 MONTHS</u>
ADDRESS (Business Address Acceptable)	SECURITY FOR LOAN	
<u>1126 BRIDGE WAY, SACRAMENTO, CA</u>	<input type="checkbox"/> None <input checked="" type="checkbox"/> Personal residence	
BUSINESS ACTIVITY, IF ANY, OF LENDER	<input type="checkbox"/> Real Property _____ <i>Street address</i>	
<u>FINANCIAL PLANNING</u>	_____ <i>City</i>	
HIGHEST BALANCE DURING REPORTING PERIOD	<input type="checkbox"/> Guarantor _____	
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> Other _____ <i>(Describe)</i>	
<input type="checkbox"/> \$1,001 - \$10,000		
<input checked="" type="checkbox"/> \$10,001 - \$100,000		
<input type="checkbox"/> OVER \$100,000		
Comments: _____		

Schedule C Excel Format

SCHEDULE C Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

CALIFORNIA FORM **700**

FAIR POLITICAL PRACTICES COMMISSION

Name

PAT CLARK

1. Income Received

NAME AND ADDRESS OF SOURCE	BUSINESS ACTIVITY, IF ANY	YOUR BUSINESS POSITION	GROSS INCOME RECEIVED	CONSIDERATION FOR WHICH INCOME WAS RECEIVED
RYDER TRANSPORT INC. 708 WINTERS AVE, SACRAMENTO, CA	MOVING COMPANY	TECHNOLOGY ANALYST	\$10,001-\$100,000	SALARY
ERNST & YOUNG 8565 MADISON AVE, SACRAMENTO, CA	ACCOUNTING FIRM	N/A	\$10,001-\$100,000	SPOUSE'S OR REGISTERED DOMESTIC PARTNER'S INCOME
UNIVERSAL OUTDOOR CO. 9563 CITY VIEW CT, SACRAMENTO, CA	ONLINE CAMP EQUIPMENT RETAILER	BOARD MEMBER	NONE - BUSINESS POSITION ONLY	N/A
SAMANTHA WRIGHT 421 MOON ST, SACRAMENTO, CA	N/A	N/A	\$10,001-\$100,000	SALE OF CAR

Please Note: Due to presentation restraints, this chart does not include the loans portion of the Excel format.

Amending Schedule C

- File amendments as soon as error or omission is discovered.
- Complete only the schedule with error(s).
- Amended schedule is retained with entire, original statement.

SCHEDULE C
Income, Loans, & Business
Positions
 (Other than Gifts and Travel Payments)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
AMENDMENT

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

YOUR BUSINESS POSITION _____

GROSS INCOME RECEIVED No Income - Business Position Only

\$500 - \$1,000 \$1,001 - \$10,000

\$10,001 - \$100,000 OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary Spouse's or registered domestic partner's income
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use
Schedule A-2.)

Sale of _____
(Real property, car, boat, etc.)

Loan repayment

Commission or Rental Income, list each source of \$10,000 or more
(Describe)

Other _____
(Describe)

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

YOUR BUSINESS POSITION _____

GROSS INCOME RECEIVED No Income - Business Position Only

\$500 - \$1,000 \$1,001 - \$10,000

\$10,001 - \$100,000 OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary Spouse's or registered domestic partner's income
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use
Schedule A-2.)

Sale of _____
(Real property, car, boat, etc.)

Loan repayment

Commission or Rental Income, list each source of \$10,000 or more
(Describe)

Other _____
(Describe)

Comments: _____

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*	INTEREST RATE	TERM (Months/Years)
ADDRESS (Business Address Acceptable) _____	_____ % <input type="checkbox"/> None	_____
BUSINESS ACTIVITY, IF ANY, OF LENDER _____	SECURITY FOR LOAN	
HIGHEST BALANCE DURING REPORTING PERIOD	<input type="checkbox"/> None <input type="checkbox"/> Personal residence	
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> Real Property _____ <small>Street address</small>	
<input type="checkbox"/> \$1,001 - \$10,000	_____ City	
<input type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> Guarantor _____	
<input type="checkbox"/> OVER \$100,000	<input type="checkbox"/> Other _____ <small>(Describe)</small>	

Filer's Verification

Print Name _____ Office, Agency or Court _____

Statement Type 2016/2017 Annual _____ Annual Assuming Leaving Candidate
(yr)

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 certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____ Filer's Signature _____
(month, day, year)

Questions

- Call 916-322-5660 or 866-275-3772 (866-ASK-FPPC)
 - Monday - Thursday, 9–11:30 a.m.
- E-mail advice@fppc.ca.gov

E-Filing Problems

- Your agency's system: Contact your filing officer
- FPPC's system: E-mail form700@fppc.ca.gov

Other Form 700 Filer Videos

Completing Form 700: Need to Know

Cover Page

Schedule A-1: Investments (Less than 10% Ownership Interest)

Schedule A-2: Investments, Income, and Assets of Business Entities/Trusts (Ownership Interest is 10% or Greater)

Schedule B: Interests in Real Property

Schedule D: Income - Gifts

Schedule E: Income – Gifts, Travel Payments, Advances, & Reimbursement