* - Required Fields

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City of San Antonio

Personal Financial Statement Addendum

For use of this form, see Section 2-74 of the City Ethics Code

Please fill this form out online and print it using the ***Print*** button provided.
Mail the form to the location listed at the end of the form.
Do not leave any block blank. Enter "N/A" or "None".
Attach additional sheets if necessary.

Office of the City Clerk

Type of Report: City Ethics Code Addendum for the Mayor, Members of City Council, Candidates for Mayor and City Council, the City Manager, and the City Attorney to the Personal Financial Statement (PFS) Mandated under Section 145.001 - 145.010 of the Local Government Code.

Report Period: 01/01/2016 to 12/31/2016

*Status of Reporting Party: **Check appropriate box and list name of filer**

◯ Mayor (Current or Candidate) _____

◯ Member of City Council (Current or Candidate) _____

◯ City Manager _____

◯ City Attorney _____

In this addendum, the reporting party shall report information required by the City Ethics Code that is not required in the Local Government Code Personal Financial Statement (PFS). If information requested within this addendum was reported within the PFS, you may state "PFS" as a response on this form. If the question is not applicable, mark N/A or None.

Use the ***Add*** button to add as many rows as needed. Use the ***Delete*** button to remove a row.

(A) The name of any person related as parent, child, or spouse to the reporting party not reported within the cover page of the PFS:

*Parent	*Children (except minors)	*Spouse	Add
			Delete

(B) The name of any member of the reporting party's household not disclosed in (A) above or within the cover sheet of the PFS:

*Name of Household Member	Add
	Delete

(C) The name of any employer of any person disclosed under (A) or (B) above, *i.e.* parent, child (except minors), spouse, or household member, who were not disclosed in Section 1 of the PFS:

*Employer Name	*Person	Add
		Delete

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(D) The name of any business entity in which the reporting party's spouse holds an economic interest not disclosed in Section 7B or Section 11A of the PFS:

*Name of Business Entity	*Type of Economic Interest	Add
		Delete

(E) The name of any business which the reporting party knows is a partner, or a parent or subsidiary business entity of a business entity owned, operated, or managed by the reporting party or his or her spouse if not disclosed in Section D of this addendum or in Section 7B or Section 11A of the PFS:

*Name of Business	*Partner or a Parent or Subsidiary	*Reporting Party or His/Her Spouse	Add
			Delete

(F) The name of any person or business entity from whom the reporting party, his, or her spouse, directly or indirectly:
(1) has received and not rejected an unsolicited offer of subsequent employment, or
(2) has accepted an offer of subsequent employment, which is binding or expected by the parties to be carried out:

*From Who Offered	*By Whom Received or Accepted	Add
		Delete

(G) The name of each nonprofit entity in which the reporting party serves as an officer or director, or in any other policy making position if not disclosed in Section 12 of the PFS:

*Name of Nonprofit Entity	*Title of Policy Making Position	Add
		Delete

(H) The name of each business entity which has sought city business, has a current city contract or anticipates seeking city business in which the reporting party, or the reporting party's parent, child (except minors), or spouse directly or indirectly owns ten (10) percent or more of the voting stock or shares or of the fair market value of the business entity:

*Name of Business Entity	*Sought/Has Contract	*By Whom Owned	Add
			Delete

(I) The name of any business entity of which any individual or entity disclosed in the preceding question (section H) is known to be a subcontractor on a city contract, a partner or a parent or subsidiary business entity.

*Name of Business Entity	*Subcontractor/Partner/Parent	*Owner	Add
			Delete

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(J) The name of each source of income, other than dividends or interest, amounting to more than five thousand dollars ($5,000) received during the reporting period by the reporting party's spouse, unless that source was disclosed in Section of the PFS or within this addendum:

*Name of Source of Income Received by Reporting Party	*Name of Source of Income Received by Reporting Party's Spouse	Add
		Delete

(K) All real property* located in the State of Texas in which the reporting party or his or her spouse has a leasehold interest, a contractual right to purchase, or an interest as: fee simple owner; beneficial owner; partnership owner; joint owner with an individual or corporation; or owner of more than twenty-five (25) percent of a corporation that has title to real property that was not reported in Section 7A of the PFS

*There is no requirement to list any property:
(1) reported in Section 7A of the PFS;
(2) used as a personal residence of a peace officer;
(3) over which the reporting party has no decision power concerning acquisitions or sale; or
(4) held through a real estate investment trust, mutual fund, or similar entity, unless the reporting party or his or her spouse participates in the management thereof.

*Identification by street address, or legal or lot-and-block description	*Type Interest/Right/Ownership	Add
		Delete

(L) The name of persons or entities to whom the reporting party or spouse owes an unsecured debt of more than five thousand dollars ($5,000.00). DO NOT INCLUDE:

(1) debts reported in Section 6 of the PFS;
(2) money borrowed from a family member from his or her own resources; and
(3) revolving charge accounts.

*Name of Person or Entity to Whom Owed	*Amount	Add
		Delete

* - Required Fields

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(M) The name of each person, business entity, or other organization from whom the reporting party, or his or her spouse, received a *gift with an estimated fair market value in excess of one hundred dollars ($100) during the reporting period and the estimated fair market value of each gift, unless reported in Section 8 of the PFS. (PFS Section 8 requires disclosure of gifts exceeding $250).
"*Gift," means a voluntary transfer of property (including the payment of money) or the conferral of a benefit having pecuniary value (such as the rendition of services or the forbearance of collection on a debt), unless consideration of equal or greater value is received by the donor.

Excluded from this requirement are:

(1) gifts reported in Section 8 of the PFS;
(2) lawful campaign contributions, which are reported as required by state statute;
(3) gifts received from family members within the second degree of affinity or consanguinity;
(4) gifts from an individual based on personal friendship who during the preceding three calendar years: a) has not done or sought to do business with the city B) has not sought city action on any issue before the City Council or any city board or commission; C) is not associated with any business or entity that has done or sought to do business with the city; and D) is not associated with any business or entity that has sought city action on any issue before the City Council or a city board or commission.
(5) gifts received among and between fellow city employees and city officials; and
(6) admission to events in which the reporting party participated in connection with official duties.
(7) payment of or reimbursement of travel and accommodations expenses accepted in connection with official duties, which have been reported under Part G, Section 4; payment for or reimbursement of expenses for travel in excess of authorized rates under city policy are gifts subject to the reporting requirements under this section.

*Name of Each Person, Business Entity, or Other Organization	*Estimated Fair Market Value	Add
		Delete

* - Required Fields

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Public Disclosure of Information

The Public Information Act allows employees, public officials and former employees and officials to elect whether to keep certain information about them confidential. Unless you choose to keep it confidential, the following information about you may be subject to public release if requested under the Texas Public Information Act. Therefore, please indicate whether you wish to allow public release of the following information.

*I **want** the public to have access to my: (Please indicate)

Home Address	◯ Yes	◯ No
Home Telephone Number	◯ Yes	◯ No
Social Security Number	◯ Yes	◯ No
Emergency Contact Information	◯ Yes	◯ No
Information that reveals whether you have family members	◯ Yes	◯ No

*Consent for Release of Public Information

☐ I understand that if any member of the public makes a request for information included in this Application for Appointment, most of the information must be disclosed under the Texas Public Information Act. I understand that the City of San Antonio will attempt to maintain the confidentiality of highly private matters in accordance with the Texas Public Information Act. I understand that it may not be legally possible to maintain the confidentiality of such information, and I hereby release the City of San Antonio, and its agents, employees and officers, from any and all liability whatsoever if the information must be released pursuant to the Texas Public Information Act or any other law requiring its release.

*Oath

☐ By clicking this box, I swear or affirm that the statements contained in this Personal Financial Statement Addendum (including any accompanying supplements) to the best of my knowledge and belief are true, correct, and complete.

*Enter your Name: _____ Date: _____

Complete this form online. Use the ***Print*** button and mail this form, along with all required documentation, to:

Office of the City Clerk
P.O. Box 839966
San Antonio, Texas 78283-3966
Office of the City Clerk - (210) 207-7253

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