



# OCCUPATION INCOME

PART 1

List all sources of occupational income that exceeded 10% of your gross income or \$5,000 in salary, bonuses, commissions or professional fees, or \$20,000 in payment for goods, products or non-professional services per source.

1 NAME OF EMPLOYER OR SOURCE OF INCOME	
2 BUSINESS ADDRESS	ADDRESS CITY STATE ZIP CODE
3 NATURE OF OCCUPATION OR BUSINESS	
4 CATEGORY OR AMOUNT	<input type="checkbox"/> At least \$1 but less than \$10,000 <input type="checkbox"/> At least \$10,000 but less than \$20,000 <input type="checkbox"/> At least \$20,000 but less than \$50,000 <input type="checkbox"/> At least \$50,000 but less than \$75,000 <input type="checkbox"/> At least \$75,000 but less than \$100,000 <input type="checkbox"/> \$100,000 or more, report to nearest \$100,000 <input type="checkbox"/> Enter an Amount

5 MEMO

Sample

If you are a self-employed solo practitioner or if you had at least 5% interest in a partnership, professional corporation or other entity through which you do business, list the names and addresses of clients or customers from whom you or this partnership, professional corporation, or entity received 10% or more of gross income or \$5,000 in salary, bonuses, commissions or professional fees; or \$20,000 in payment for goods, products or non professional services during the reporting period.

1 NAME OF CLIENT OR CUSTOMER	
2 ADDRESS	ADDRESS CITY STATE ZIP CODE

3 MEMO

*Sample*

# NON-OCCUPATION INCOME

PART 3

List all sources of income which exceeded either \$5,000 or were in excess of 10% of your gross income received from interest, dividends, royalties, rents, trust disbursements or other non-occupational sources.

1 NAME OF SOURCE	
2 NATURE OF INCOME	
3 CATEGORY OR AMOUNT	<ul style="list-style-type: none"><li><input type="checkbox"/> At least \$1 but less than \$10,000</li><li><input type="checkbox"/> At least \$10,000 but less than \$20,000</li><li><input type="checkbox"/> At least \$20,000 but less than \$50,000</li><li><input type="checkbox"/> At least \$50,000 but less than \$75,000</li><li><input type="checkbox"/> At least \$75,000 but less than \$100,000</li><li><input type="checkbox"/> \$100,000 or more, report to nearest \$100,000</li><li><input type="checkbox"/> Enter an Amount</li></ul>

4 MEMO	
--------	--

Sample

# GIFTS

# PART 4

Identify any source (person, business entity or other organization) of a gift of any money or other thing of value exceeding \$100 or identify any source who gave you a series of gifts the total value of which exceeds \$100. You need not report campaign contributions which are reported as required by other law and you need not report gifts received from the following relatives: Spouse, Children, Children-in-law, Parents, Parents-in-Law, Grandchildren, Grandchildren-in-Law, Grandparents, Grandparents-in-Law, Brothers, Brothers-in-Law, Sisters, Sisters-in-Law, Uncles, Uncles-in-Law, Aunts, Aunts-in-Law, Nephews, Nephews-in-Law, Nieces, Nieces-in-Law, First Cousins, or First Cousins-in-Law.

1 NAME OF SOURCE OF GIFT

2 CATEGORY OR AMOUNT

- At least \$1 but less than \$10,000
- At least \$10,000 but less than \$20,000
- At least \$20,000 but less than \$50,000
- At least \$50,000 but less than \$75,000
- At least \$75,000 but less than \$100,000
- \$100,000 or more, report to nearest \$100,000
- Enter an Amount

3 MEMO

**OTHER BUSINESS OWNERSHIPS/INTERESTS**

**PART 5**

List the names of any corporation, partnership, limited partnership, or other entity in which you held, owned, acquired, or sold stock, or any other equity ownership having a value exceeding \$5,000 or equivalent to 5% or more of the stock or equity in the entity, at any time during the reporting period.

1 NAME OF COMPANY OR ENTITY

2 MEMO

Sample

# BONDS/NOTES/COMMERCIAL PAPER

PART 6

List and describe all bonds, notes and other commercial paper which you held, owned, acquired or sold at any time during the reporting period if the combined face value of the bonds, notes and commercial paper exceeded \$5,000.

1 DESCRIPTION OF COMMERCIAL PAPER

2 CATEGORY OR AMOUNT

- At least \$1 but less than \$10,000
- At least \$10,000 but less than \$20,000
- At least \$20,000 but less than \$50,000
- At least \$50,000 but less than \$75,000
- At least \$75,000 but less than \$100,000
- \$100,000 or more, report to nearest \$100,000
- Enter an Amount

3 MEMO

Sample

**OTHER INCOME SOURCES**

**PART 7**

List all other income or revenue in excess of \$5,000 per source.

**1** NAME OF SOURCE

**2** CATEGORY OR AMOUNT

- At least \$1 but less than \$10,000
- At least \$10,000 but less than \$20,000
- At least \$20,000 but less than \$50,000
- At least \$50,000 but less than \$75,000
- At least \$75,000 but less than \$100,000
- \$100,000 or more, report to nearest \$100,000
- Enter an Amount

**3** MEMO

Sample



**REAL PROPERTY OWNERSHIP OR SALE**

**PART 8**

List and describe all real property in which you hold any legal or beneficial interest, including real property for which you have entered into a contract for sale. The description should be sufficient to locate the property, and include the street address if any, and the present use of the property.

1 STREET ADDRESS OF PROPERTY	ADDRESS CITY STATE ZIP CODE
2 DESCRIPTION OF PROPERTY	
3 PRESENT USE OF PROPERTY	

4 MEMO

Sample

# REAL PROPERTY, BUSINESS ENTITY

PART 9

List and describe all real property held, owned, acquired or sold, or under a contract for sale, by a corporation, partnership, limited partnership, professional corporation, or other entity in which you own or control at least a 5% interest. The description should be sufficient to locate the property and include a street address, if any, and the present use of the property.

1 STREET ADDRESS OF PROPERTY	ADDRESS CITY STATE ZIP CODE
2 DESCRIPTION OF PROPERTY	
3 PRESENT USE OF PROPERTY	

4 MEMO
--------

Sample

# LOANS AS LENDOR/CREDITOR

PART 10

List all loans and extensions of credit in excess of \$5,000 on which you are the lender or creditor, including the name of the debtor and the rate of interest, if any.

1 NAME OF BORROWER/DEBTOR

2 RATE OF INTEREST, IF ANY

3 CATEGORY OR AMOUNT

- At Least \$1 but less than \$10,000
- At least \$10,000 but less than \$20,000
- At least \$20,000 but less than \$50,000
- At least \$50,000 but less than \$75,000
- At Least \$75,000 but less than \$100,000
- \$100,000 or more, report to nearest \$100,000
- Enter an Amount

4 MEMO

# GUARANTOR/CO-SIGNER TO LOANS/TRANSACTIONS

PART 11

List all loans or transactions in excess of \$5,000 on which you are a guarantor or co-signer, including the names of the borrower and lender.

1 NAME OF LENDER/CREDITOR/OBLIGEE	
2 NAME OF BORROWER/DEBTOR	
3 RATE OF INTEREST, IF ANY	
4 CATEGORY OR AMOUNT	<ul style="list-style-type: none"><li><input type="checkbox"/> At least \$1 but less than \$10,000</li><li><input type="checkbox"/> At least \$10,000 but less than \$20,000</li><li><input type="checkbox"/> At least \$20,000 but less than \$50,000</li><li><input type="checkbox"/> At least \$50,000 but less than \$75,000</li><li><input type="checkbox"/> At least \$75,000 but less than \$100,000</li><li><input type="checkbox"/> \$100,000 or more, report to nearest \$100,000</li><li><input type="checkbox"/> Enter an Amount</li></ul>

5 MEMO

# LOANS/DEBTS/FINANCIAL LIABILITIES (PERSONAL)

PART 12

List all loans, debts, and other financial liabilities you have which are in excess of \$5,000 which are presently outstanding or which existed at any time during the reporting period.

1 NAME OF LENDER/CREDITOR/OBLIGEE	
2 RATE OF INTEREST, IF ANY	
3 DATE OBLIGATION WAS INCURRED	
4 CATEGORY OR AMOUNT	<ul style="list-style-type: none"><li><input type="checkbox"/> At least \$1 but less than \$10,000</li><li><input type="checkbox"/> At least \$10,000 but less than \$20,000</li><li><input type="checkbox"/> At least \$20,000 but less than \$50,000</li><li><input type="checkbox"/> At least \$50,000 but less than \$75,000</li><li><input type="checkbox"/> At least \$75,000 but less than \$100,000</li><li><input type="checkbox"/> \$100,000 or more, report to nearest \$100,000</li><li><input type="checkbox"/> Enter an Amount</li></ul>

5 MEMO

# LOANS/DEBTS/FINANCIAL LIABILITIES (BUSINESS)

PART 12B

List all loans, debts, and other financial liabilities in excess of \$5,000 of any corporation, partnership, limited partnership, professional corporation or other entity in which you own or control at least a 5% interest, which are presently outstanding or which existed at any time during the reporting period.

1 NAME OF LENDER/CREDITOR/OBLIGEE	
2 RATE OF INTEREST, IF ANY	
3 DATE OBLIGATION WAS INCURRED	
4 CATEGORY OR AMOUNT	<ul style="list-style-type: none"><li><input type="checkbox"/> At least \$1 but less than \$10,000</li><li><input type="checkbox"/> At least \$10,000 but less than \$20,000</li><li><input type="checkbox"/> At least \$20,000 but less than \$50,000</li><li><input type="checkbox"/> At least \$50,000 but less than \$75,000</li><li><input type="checkbox"/> At least \$75,000 but less than \$100,000</li><li><input type="checkbox"/> \$100,000 or more, report to nearest \$100,000</li><li><input type="checkbox"/> Enter an Amount</li></ul>

5 MEMO

# BOARDS OF DIRECTORS (MEMBERSHIP & POSITION)

PART 13

List all boards of directors of which you are a member and the offices or executive positions which you hold in corporations, partnerships, limited partnerships, professional corporations, or other entities, including non-business entities. (Do not include positions on corporations or other entities owned by the City of Austin or created by the City Council.)

1 NAME OF ORGANIZATION

2 POSITION HELD

3 MEMO

Sample

# STATEMENT OF FINANCIAL INFORMATION

## PARTS MARKED "NOT APPLICABLE" BY FILER

---

---

- N/A Part 1 - Occupation Income
- N/A Part 2 - Self-employment/Professional Corp./Small Business Income
- N/A Part 3 - Non-Occupation Income
- N/A Part 4 - Gifts
- N/A Part 5 - Other Business Ownership/Interests
- N/A Part 6 - Bonds/Notes/Commercial Paper
- N/A Part 7 - Other Income Sources
- N/A Part 8 - Real Property Ownership or Sale
- N/A Part 9 - Real Property, Business Entity
- N/A Part 10 - Loans as Lender/Creditor
- N/A Part 11 - Guarantor/Co-Signer to Loans/Transactions
- N/A Part 12 - Loans/Debts/Financial Liabilities (Personal)
- N/A Part 12b - Loans/Debts/Financial Liabilities (Business)
- N/A Part 13 - Boards of Directors (Membership & Position)



# STATEMENT OF FINANCIAL INFORMATION AFFIDAVIT

This information serves as the electronic signature of the person legally responsible for filing this report.

Under penalty of perjury, I swear or affirm that the preceding Financial Statement of Information is in all things true and correct and fully shows all information required to be reported pursuant to City Code Section 2-7-72 for the reporting period indicated.

\_\_\_\_\_  
FirstName LastName

Signature of Filer

Sample