

California Democratic Party
Financial Disclosure Statement of Statewide Officers and
Notice of Acquisition of Material Financial Interest

Please complete this form and submit to the CDP Office to chris@cadem.org. An electronic version of this form is downloadable at www.cadem.org/rulescommittee. Quarterly Financial Disclosure Statement of Statewide Officers is due quarterly by April 15 (Quarter 1), July 15 (Quarter 2), October 15 (Quarter 3), and January 15 (Quarter 4). Notice of Acquisition of Material Financial Interest is due fifteen (15) days after acquiring the material financial interest. Please use more than one form for your filing if necessary.

(Page 1 of 2)

General Information

Filing Date (mm/dd/yy): _____ CDP Position: _____

Type of Filing (Please check the appropriate box):

- Quarterly Financial Disclosure Statement of Statewide Officers (Due 15th of the month after each quarter)
 Notice of Acquisition of Material Financial Interest (Due 15 days after acquiring)

Filing Year: _____

Please check the appropriate box denoting the quarter for which this form is filed.

- Quarter 1 (January – March)
 Quarter 2 (April – June)
 Quarter 3 (July – September)
 Quarter 4 (October – December)

Statewide Officer Information

Name: _____ Email: _____

Phone (Cell): _____ Phone (Home): _____ Phone (Office): _____

Resident (Voting) Address: _____ City: _____ ZIP: _____

Office Address: _____ City: _____ ZIP: _____

Information of Treasurer or Person Completing This Form on Behalf of the Statewide Officer (If Applicable)

Name: _____ Email: _____

Phone (Cell): _____ Phone (Home): _____ Phone (Office): _____

Address: _____ City: _____ ZIP: _____

Pursuant to California Democratic Party (CDP) Bylaws, Article II. Section 12. on Conflict of Interest Disclosure:

a. A member of This Committee must disclose to other Members of This Committee while addressing a Convention, Executive Board Meeting, or through written disclosure when communicating through mail, e-mail, or other digital communication, primarily directed towards members of This Committee, that said member, the spouse of the member, or the domestic partner of the member has a material financial interest in advocating for or against a candidate for State or Federal Office or one or more state initiatives if said oral or written communication relates to the material financial interest.

b. For purposes of this section, a “financial interest in advocating for or against a candidate or one or more state initiatives” exists when the member or the spouse/domestic partner of the member:

- (1) is a candidate for the public office under consideration; or,
- (2) is a paid employee or independent contractor of a political committee or owner, paid employee or independent contractor of a consulting firm which is taking a position for or against one or more candidates or state initiatives under consideration; or
- (3) is an employee who serves or works in paid employment at the pleasure of a person standing for election to the office under consideration; provided, however, that nothing in this rule shall require any person serving on a non-salaried basis as an appointee to a public panel, board or commission to make such disclosure; or
- (4) otherwise receives monetary compensation for the purposes of taking a position for or against one or more candidates or state initiatives under consideration.

c. A financial interest is “material” when it has a value of \$1,000 or more in a calendar year.

d. Disclosure shall be accomplished by stating verbally, when speaking, or in the communication itself when doing so through mail, e-mail, or other digital communication, primarily directed towards members of This Committee, the material financial interest the member of This Committee has in the candidates or state initiatives under consideration.

e. Statewide Officers of This Committee shall be required to file quarterly financial disclosures statements (promulgated by the Rules Committee), itemizing any compensation constituting a material financial interest as defined herein, and shall file a “Notice of Acquisition of Material Financial Interest” within fifteen (15) days of acquiring same.

f. Such quarterly financial disclosure statements shall be filed with the CDP Office, no later than the 15th of the month after the end of each quarter, available upon request, with each Statewide Officer’s current disclosure statement made available on the CDP website, within 48 hours of filing.

Financial Interest Disclosure (Entry 1)

Candidate/State Initiative Promoted or Opposed: _____

Name of Financial Interest Source: _____

Date Financial Interest Source Acquired: _____

Financial Interest Applicable to (Check all that apply): The Statewide Officer The Statewide Officer's Spouse or Domestic Partner

Nature of Financial Interest Activity (Check all that apply):

The Statewide Officer, or the Statewide Officer's Spouse or Domestic Partner is a:

- Candidate for public office under consideration
- Paid employee or independent contractor of a political committee or owner, paid employee or independent contractor of a consulting firm which is taking a position for or against one or more candidates or state initiatives under consideration
- An employee who serves or works in paid employment at the pleasure of a person standing for election to the office under consideration; provided, however, that nothing in this rule shall require any person serving on a non-salaried basis as an appointee to a public panel, board or commission to make such disclosure
- Otherwise receives monetary compensation for the purposes of taking a position for or against one or more candidates or state initiatives under consideration.

Financial Interest Disclosure (Entry 2)

Candidate/State Initiative Promoted or Opposed: _____

Name of Financial Interest Source: _____

Date Financial Interest Source Acquired: _____

Financial Interest Applicable to (Check all that apply): The Statewide Officer The Statewide Officer's Spouse or Domestic Partner

Nature of Financial Interest Activity (Check all that apply):

The Statewide Officer, or the Statewide Officer's Spouse or Domestic Partner is a:

- Candidate for public office under consideration
- Paid employee or independent contractor of a political committee or owner, paid employee or independent contractor of a consulting firm which is taking a position for or against one or more candidates or state initiatives under consideration
- An employee who serves or works in paid employment at the pleasure of a person standing for election to the office under consideration; provided, however, that nothing in this rule shall require any person serving on a non-salaried basis as an appointee to a public panel, board or commission to make such disclosure
- Otherwise receives monetary compensation for the purposes of taking a position for or against one or more candidates or state initiatives under consideration.

Financial Interest Disclosure (Entry 3)

Candidate/State Initiative Promoted or Opposed: _____

Name of Financial Interest Source: _____

Date Financial Interest Source Acquired: _____

Financial Interest Applicable to (Check all that apply): The Statewide Officer The Statewide Officer's Spouse or Domestic Partner

Nature of Financial Interest Activity (Check all that apply):

The Statewide Officer, or the Statewide Officer's Spouse or Domestic Partner is a:

- Candidate for public office under consideration
- Paid employee or independent contractor of a political committee or owner, paid employee or independent contractor of a consulting firm which is taking a position for or against one or more candidates or state initiatives under consideration
- An employee who serves or works in paid employment at the pleasure of a person standing for election to the office under consideration; provided, however, that nothing in this rule shall require any person serving on a non-salaried basis as an appointee to a public panel, board or commission to make such disclosure
- Otherwise receives monetary compensation for the purposes of taking a position for or against one or more candidates or state initiatives under consideration.

The statements in this document and those in any attachment(s) are true and correct. I understand that my filing will be made available on the CDP website within 48 hours of filing.

Signature of Statewide Officer

Print Full Name

Date