



Assessment Appeals Board

City & County of San Francisco

1 Dr. Carlton B. Goodlett Pl., City Hall, Room # 405

San Francisco, California 94102

Phone: (415) 554-6778 / Fax: (415) 554-6775 / Email: aab@sfgov.org

ASSESSMENT APPEALS BOARD MEMBER APPLICATION

Complete and return this application to the Assessment Appeals Board

Application for Appointment to:
(Please check one)

☒ Board 1 or ☐ Board 1 Alternate
☒ Board 2 or ☐ Board 2 Alternate
☒ Board 3 or ☐ Board 3 Alternate

Full Name: Franco Cirelli

Zip Code: 94131

Occupation: Finance Consultant

Work Phone: 4158304182

Employer: Franco Cirelli, CPA, CRP®

Business Address: 18 Fairmount Street

Zip Code: 94131

Business Email: francocirelli@gmail.com

Home E

Form 700 is required to accompany your application. Have you attached the Form 700? ☒ Yes ☐ No

Pursuant to Ordinance No. 393-98 the following qualifications are required:

A person shall not be eligible for nomination for membership on an assessment appeals board unless he or she has a minimum of five years' professional experience in this state as one of the following: (1) certified public accountant or public accountant; (2) licensed real estate broker; (3) attorney; or (4) property appraiser accredited by a nationally recognized professional organization, or property appraiser certified by either the Office of Real Estate Appraiser or by the State Board of Equalization. Documentation of qualifying experience must be submitted with this application form. This requirement does not apply to incumbent board members nominated for appointments to their same seats.

Please state your qualifications (including occupation and education if applicable):

As an independent finance professional with a CFP® credential, I earned an MBA from the Kellogg School of Management at Northwestern University, a BS from the Haas School of Business at UC Berkeley and a CPA license upon completion of the required experience with Deloitte & Touche. Earlier in my professional career, I held positions at noteworthy organizations including Microsoft and the National Basketball Association. I worked as an adjunct faculty member for fifteen years at City College of San Francisco where I taught real estate, entrepreneurship and other business courses and developed new curriculum. Finally, I am a licensed real estate broker in California.

Please state relevant business and/or professional experience:

With extensive professional experience in organizations ranging from startups to large enterprises and multiple professional credentials, I help ensure that my advisory clients are able to optimize use of their resources in pursuit of their goals. I serve as a trusted, licensed consultant to my clients on matters of financial planning, investment management and related disciplines. Along with my wife, Gabriella, we cofounded Primeros Pasos® Spanish immersion daycare and preschool for which I help oversee the business side of the operations whereas Gabriella applies her extensive experience and vision of providing the highest quality Spanish immersion education to young children in an environment that focuses unwaveringly on them.

Please state civic activities:

As a life-long San Franciscan, I consider myself an active community builder in our city and remain committed to helping all of us thrive in a safe, welcoming and vibrant urban setting. I hold leadership roles and am active in a number of organizations, guiding them in their pursuit of service to others:

- Citizen Police Advisory Board – SFPD's Ingleside Precinct
- San Francisco Italian Athletic Club Foundation Board - Treasurer
- ITAL Foundation Board - Treasurer
- Italian Caucus of California - Treasurer
- Archbishop Riordan High School Board of Trustees
- Order of Malta (Global Humanitarian, Medical & Social Assistance Providers) - Western US Association

Would you be able to attend Day Meetings? ☒ Yes ☐ No Evening Meetings? ☒ Yes ☐ No

How many days a week would you be available for hearings? 1 How many evenings a week? 1

Have you attended an Assessment Appeals Board meeting? ☒ Yes ☐ No

An appearance before the Rules Committee may be required at a scheduled public hearing, prior to the Board of Supervisors considering the recommended appointment. Applications should be received ten (10) days prior to the scheduled public hearing.

Date: 09/25/25 Applicant's Signature: Francis Cirilli

(Manually sign or type your complete name).

NOTE: by typing your complete name, you are hereby consenting to use of electronic signature)

PLEASE NOTE: This application will be retained for one year. Once completed, this form, including all attachments, becomes public record.

FOR OFFICE USE ONLY:

Appointed to Seat #: _____ Term Expires: _____ Date Vacated: _____

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE

Date Initial Filing Received

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Cirelli Franco

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

Assessment Appeals Board

Board Member

Division, Board, Department, District, if applicable

Your Position

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

☐ State

☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)

☐ Multi-County _____

☐ County of _____

☒ City of San Francisco

☐ Other _____

3. Type of Statement (Check at least one box)

☒ **Annual:** The period covered is January 1, 2024, through
December 31, 2024.

☐ **Leaving Office:** Date Left _____
(Check one circle below.)

-or-

The period covered is _____, through
December 31, 2024.

☐ The period covered is January 1, 2024, through the date of
leaving office.

☐ **Assuming Office:** Date assumed _____

-or-

☐ The period covered is _____, through
the date of leaving office.

☐ **Candidate:** Date of Election _____ and office sought, if different than Part 1: _____

4. Schedule Summary (required)

► Total number of pages including this cover page: _____

Schedules attached

☒ **Schedule A-1 - Investments** – schedule attached

☒ **Schedule C - Income, Loans, & Business Positions** – schedule attached

☒ **Schedule A-2 - Investments** – schedule attached

☐ **Schedule D - Income – Gifts** – schedule attached

☒ **Schedule B - Real Property** – schedule attached

☐ **Schedule E - Income – Gifts – Travel Payments** – schedule attached

-or-

☐ **None** - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

18 Fairmount Street

San Francisco

CA

94131

DAYTIME TELEPHONE NUMBER

(415) 269-1692

E-MAIL ADDRESS

francocirelli@gmail.com

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 acknowledge this is a public document.

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

Date Signed 09/25/25
(month, day, year)

Signature Francisco Cirelli
(File the originally signed paper statement with your filing official.)

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

▶ NAME OF BUSINESS ENTITY
Apple

GENERAL DESCRIPTION OF THIS BUSINESS
Multinational Technology Company

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☒ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock ☐ Other _____
(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
_____/_____/24 ____/____/24
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Qunice Therapeutics

GENERAL DESCRIPTION OF THIS BUSINESS

Biotech

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other _____
(Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499

☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24

ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock ☐ Other _____
(Describe)

☐ Partnership ☐ Income Received of \$0 - \$499

☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/ **24** ____/____/ **24**

ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499

☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24 ____/____/24

ACQUIRED DISPOSED

Filer's Verification

Print Name Franco Cirelli

Office, Agency or Court Assessment Appeals Board

Statement Type ☒ 2024/2025 Annual ☐ Assuming ☐ Leaving
☐ _____ Annual ☐ 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 09/25/25
(month, day, year)

Filer's Signature Franco Cirelli

Comments:

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

▶ 1. BUSINESS ENTITY OR TRUST

Primeros Pasos® LLC

Name

18 Fairmount Street, San Francisco CA 94131

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☒ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

Education

FAIR MARKET VALUE

- ☐ \$0 - \$1,999
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☒ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 / / 24 / / 24
ACQUIRED DISPOSED

NATURE OF INVESTMENT

Partnership ☐ Sole Proprietorship ☐ Other ☐

YOUR BUSINESS POSITION CFO

▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- ☐ \$0 - \$499 ☐ \$10,001 - \$100,000
☐ \$500 - \$1,000 ☒ OVER \$100,000
☐ \$1,001 - \$10,000

▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

☐ None or ☒ Names listed below

TBD

▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☒ REAL PROPERTY

Orsi d'Oro LLC

Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property

901 Bayshore Blvd. #101 San Francisco CA 941

Description of Business Activity or
City or Other Precise Location of Real Property

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☒ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 / / 24 / / 24
ACQUIRED DISPOSED

NATURE OF INTEREST

☒ Property Ownership/Deed of Trust ☐ Stock ☒ Partnership

☐ Leasehold Yrs. remaining ☐ Other

☐ Check box if additional schedules reporting investments or real property are attached

Comments:

Filer's Verification

Print Name Franco Cirelli

Office, Agency or Court Assessment Appeals Board

Statement Type ☒ 2024/2025 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 09/25/25

(month, day, year)

Filer's Signature

Franco Cirelli

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

► **1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME

Franco Cirelli, CPA, CFP®

ADDRESS (Business Address Acceptable)

18 Fairmount Street San Francisco, CA 941

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Financial Planning & Investment Management

YOUR BUSINESS POSITION

Licensed Finance Consultant

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 a commercial lending institution, 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)

_____% ☐ None

BUSINESS ACTIVITY, IF ANY, OF LENDER

SECURITY FOR LOAN

☐ None ☐ Personal residence

☐ Real Property _____
Street address

City

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

☐ Guarantor _____

☐ Other _____
(Describe)

Filer's Verification

Print Name Franco Cirelli

Office, Agency or Court Assessment Appeals Board

Statement Type ☒ 2024/2025 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 09/25/25

(month, day, year)

Filer's Signature Franco Cirelli

SCHEDULE B
Interests in Real Property
(Including Rental Income)

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

16 - 18 Fairmount Street

CITY

San Francisco

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☒ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 / / 24 / / 24
ACQUIRED DISPOSED

NATURE OF INTEREST

☒ Ownership/Deed of Trust ☐ Easement

☐ Leasehold _____ ☐ _____
Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☒ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

Taylor Cummings - 16 Fairmount Street

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 / / 24 / / 24
ACQUIRED DISPOSED

NATURE OF INTEREST

☐ Ownership/Deed of Trust ☐ Easement

☐ Leasehold _____ ☐ _____
Yrs. remaining Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

- ☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

* You are not required to report loans from a commercial lending institution 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*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

☐ Guarantor, if applicable

Filer's Verification

Print Name Franco Cirelli

Office, Agency or Court Assessment Appeals Board

Statement Type ☒ 2024/2025 Annual ☐ Assuming ☐ Leaving
☐ _____ Annual ☐ 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 09/25/25
(month, day, year)

Filer's Signature

Franco Cirelli

Comments: _____



Assessment Appeals Board

City & County of San Francisco

1 Dr. Carlton B. Goodlett Pl., City Hall, Room # 405

San Francisco, California 94102

Phone: (415) 554-6778 / Fax: (415) 554-6775 / Email: aab@sfgov.org

ASSESSMENT APPEALS BOARD MEMBER APPLICATION

Complete and return this application to the Assessment Appeals Board

Application for Appointment to:
(Please check one)

☒ Board 1 or ☐ Board 1 Alternate
☐ Board 2 or ☐ Board 2 Alternate
☐ Board 3 or ☐ Board 3 Alternate

Full Name: Jeffrey Jonathan Morris

San Francisco Ca

Zip Code: 94123

Occupation: Investor/Retired

Work Phone: 415 606-9580

Employer:

Business Address: Same

Zip Code:

Business Email: JJMAssociates@sbcglobal.net

Home Email:

Form 700 is required to accompany your application. Have you attached the Form 700? ☐ Yes ☒ No

Pursuant to Ordinance No. 393-98 the following qualifications are required:

A person shall not be eligible for nomination for membership on an assessment appeals board unless he or she has a minimum of five years' professional experience in this state as one of the following: (1) certified public accountant or public accountant; (2) licensed real estate broker; (3) attorney; or (4) property appraiser accredited by a nationally recognized professional organization, or property appraiser certified by either the Office of Real Estate Appraiser or by the State Board of Equalization. Documentation of qualifying experience must be submitted with this application form. This requirement does not apply to incumbent board members nominated for appointments to their same seats.

Please state your qualifications (including occupation and education if applicable):

California State Real Estate Broker License No. 00397435 [Retired]

Member Appraisal Institute [MAI] (No. 149594) [Retired]

Professional Experience: 35 year career in national investment real estate advisory, portfolio-property management, transaction, financing and valuation.

Education: BA Political Science Stanford University, 1967

(Applications must be submitted to aab@sfgov.org or the mailing address listed above)

Please state relevant business and/or professional experience:

March, 2007 — Present JJM Associates, San Francisco: Investor
1981 — February 2007 BlackRock Realty [and predecessor firms], San Francisco
Director-Portfolio Manager — \$1.0 billion Institutional client investment funds.
Managing Director, Metric Property Management: \$2.5 billion national portfolio of multi family,
office, industrial and retail properties.
Vice President/Senior Vice President of Portfolio Management
1971 — 1980 Coldwell Banker Management Corporation, San Francisco
Vice President, Appraisal — Consultation Services

Please state civic activities:

2007 — Present Board 1 Member — Assessment Appeals Board, City and County of San Francisco
1989 — 2001 Board of Directors, Golden Gate Park Stables [Concession with Recreation and
Park Department]
Current Recent member of Marina Community Association Board of Directors; San
Francisco Zoological Society; Presidio Branch San Francisco Y; California
Academy of Sciences; American Conservatory Theatre [ACT]; Olympic Club
Foundation

Would you be able to attend Day Meetings? ☒ Yes ☐ No Evening Meetings? ☐ Yes ☒ No

How many days a week would you be available for hearings? 3 How many evenings a week?

Have you attended an Assessment Appeals Board meeting? ☒ Yes ☐ No

An appearance before the Rules Committee may be required at a scheduled public hearing, prior to the Board of Supervisors considering the recommended appointment. Applications should be received ten (10) days prior to the scheduled public hearing.

Date: September 1, 2025

Applicant's Signature: _____

(Manually sign or type your complete name).
NOTE: By typing your complete name, you are hereby
consenting to use of electronic signature)

PLEASE NOTE: This application will be retained for one year. Once completed, this form, including all attachments, becomes public record.

FOR OFFICE USE ONLY:

Appointed to Seat #: _____ Term Expires: _____ Date Vacated: _____

CALIFORNIA FORM 700
 FAIR POLITICAL PRACTICES COMMISSION

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received

 E-Filed
 03/25/2025
 13:17:00

 Filing ID:
 213865581

Please type or print in ink.

NAME OF FILER (LAST)

(FIRST)

(MIDDLE)

Morris, Jeffrey

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

City and County of San Francisco

Division, Board, Department, District, if applicable

Your Position

Assessment Appeals Board

Member

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency:

Position:

2. Jurisdiction of Office (Check at least one box)☐ State☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)☐ Multi-County☒ County of San Francisco☐ City of☐ Other**3. Type of Statement (Check at least one box)**☒ **Annual:** The period covered is January 1, 2024, through
December 31, 2024.

-or-

The period covered is ____/____/____, through
December 31, 2024.☐ **Leaving Office:** Date Left ____/____/____
(Check one circle below.)☐ The period covered is January 1, 2024, through the date of
leaving office.

-or-

☐ **Assuming Office:** Date assumed ____/____/____☐ The period covered is ____/____/____, through
the date of leaving office.☐ **Candidate:** Date of Election ____ and office sought, if different than Part 1: ____**4. Schedule Summary (required)**

► Total number of pages including this cover page: 8

Schedules attached☒ **Schedule A-1 - Investments** – schedule attached☐ **Schedule C - Income, Loans, & Business Positions** – schedule attached☐ **Schedule A-2 - Investments** – schedule attached☐ **Schedule D - Income – Gifts** – schedule attached☐ **Schedule B - Real Property** – schedule attached☐ **Schedule E - Income – Gifts – Travel Payments** – schedule attached-or- ☐ **None - No reportable interests on any schedule****5. Verification**

MAILING ADDRESS

STREET

CITY

STATE

ZIP CODE

(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER

San Francisco

CA

94102

()

EMAIL ADDRESS

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 acknowledge this is a public document.

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

Date Signed

03/25/2025

(month, day, year)

Signature

Jeffrey Morris

(File the originally signed paper statement with your filing official.)

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**
(Ownership Interest is Less Than 10%)*Investments must be itemized.**Do not attach brokerage or financial statements.***CALIFORNIA FORM 700**
FAIR POLITICAL PRACTICES COMMISSION

Name

Morris, Jeffrey

▶ **NAME OF BUSINESS ENTITY**

Union Pacific Corp.

GENERAL DESCRIPTION OF THIS BUSINESS

Transportation

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
 ACQUIRED DISPOSED

▶ **NAME OF BUSINESS ENTITY**

Comcast Corp.

GENERAL DESCRIPTION OF THIS BUSINESS

Communication

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
 ACQUIRED DISPOSED

▶ **NAME OF BUSINESS ENTITY**

Google Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Tech

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
 ACQUIRED DISPOSED

▶ **NAME OF BUSINESS ENTITY**

Oracle Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Tech

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
 ACQUIRED DISPOSED

▶ **NAME OF BUSINESS ENTITY**

Qualcomm Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Tech

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
 ACQUIRED DISPOSED

▶ **NAME OF BUSINESS ENTITY**

FedEx Corp.

GENERAL DESCRIPTION OF THIS BUSINESS

Delivery

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
 ACQUIRED DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

Morris, Jeffrey

NAME OF BUSINESS ENTITY

Starbucks

GENERAL DESCRIPTION OF THIS BUSINESS

Food

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Proctor & Gamble

GENERAL DESCRIPTION OF THIS BUSINESS

Consumer Products

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Nestle

GENERAL DESCRIPTION OF THIS BUSINESS

Food

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

McDonalds Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Food

FAIR MARKET VALUE

☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Merck & Co.

GENERAL DESCRIPTION OF THIS BUSINESS

Pharmaceutical

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Dick's Sporting Goods Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Retail

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

Morris, Jeffrey

NAME OF BUSINESS ENTITY

Nike Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Retail

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24 ACQUIRED ____/____/24 DISPOSED

NAME OF BUSINESS ENTITY

Home Depot Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Home Improvement

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24 ACQUIRED ____/____/24 DISPOSED

NAME OF BUSINESS ENTITY

Costco Corp.

GENERAL DESCRIPTION OF THIS BUSINESS

Retail

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24 ACQUIRED ____/____/24 DISPOSED

NAME OF BUSINESS ENTITY

Walt Disney Co.

GENERAL DESCRIPTION OF THIS BUSINESS

Retail

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24 ACQUIRED ____/____/24 DISPOSED

NAME OF BUSINESS ENTITY

Chevron

GENERAL DESCRIPTION OF THIS BUSINESS

Energy

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24 ACQUIRED ____/____/24 DISPOSED

NAME OF BUSINESS ENTITY

Credit Suisse

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/24 ACQUIRED ____/____/24 DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

Morris, Jeffrey

NAME OF BUSINESS ENTITY

Intel Corp.

GENERAL DESCRIPTION OF THIS BUSINESS

Tech

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Pepsico

GENERAL DESCRIPTION OF THIS BUSINESS

Food

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Wells Fargo Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Pepsico

GENERAL DESCRIPTION OF THIS BUSINESS

Food

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Amazon Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Tech/Retail

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Visa Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☒ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

Morris, Jeffrey

NAME OF BUSINESS ENTITY

T Rowe Price Group Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24 ACQUIRED / / 24 DISPOSED

NAME OF BUSINESS ENTITY

EBay Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Tech/Retail

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24 ACQUIRED / / 24 DISPOSED

NAME OF BUSINESS ENTITY

Accenture PLC

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24 ACQUIRED / / 24 DISPOSED

NAME OF BUSINESS ENTITY

PNC Financial Services

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24 ACQUIRED / / 24 DISPOSED

NAME OF BUSINESS ENTITY

JP Morgan Chase & Co.

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24 ACQUIRED / / 24 DISPOSED

NAME OF BUSINESS ENTITY

BlackRock Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24 ACQUIRED / / 24 DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

Morris, Jeffrey

NAME OF BUSINESS ENTITY

Sales Force Com

GENERAL DESCRIPTION OF THIS BUSINESS

Tech

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Visa Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Verizon Communications

GENERAL DESCRIPTION OF THIS BUSINESS

Communications

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

General Electric Co.

GENERAL DESCRIPTION OF THIS BUSINESS

Industrial

FAIR MARKET VALUE

☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

US Bancorp

GENERAL DESCRIPTION OF THIS BUSINESS

Financial

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Apple, Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

Tech

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock ☐ Other (Describe)

☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

/ / 24
ACQUIRED DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

Morris, Jeffrey

NAME OF BUSINESS ENTITY

Coach Inc.

GENERAL DESCRIPTION OF THIS BUSINESS

retail

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☒ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

- ☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

_____/_____/24 ____/_____/24
ACQUIRED DISPOSED

Comments:



Assessment Appeals Board

City & County of San Francisco

1 Dr. Carlton B. Goodlett Pl., City Hall, Room # 405

San Francisco, California 94102

Phone: (415) 554-6778 / Fax: (415) 554-6775 / Email: aab@sfgov.org

ASSESSMENT APPEALS BOARD MEMBER APPLICATION

Complete and return this application to the Assessment Appeals Board

Application for Appointment to:
(Please check one)

☒ Board 1	or	☐ Board 1 Alternate
☐ Board 2	or	☐ Board 2 Alternate
☐ Board 3	or	☐ Board 3 Alternate

Full Name: Nicholas Goldman

Zip Code: 94114

Occupation: Estate Planning Attorney

Work Phone: 415-483-2099

Employer: Self-employed

Business Address: 2261 Market Street, #14, San Francisco, CA

Zip Code: 94114

Business Email: nicholas@nicholasgoldmanlaw.com Home Email:

Form 700 is required to accompany your application. Have you attached the Form 700? ☒ Yes ☐ No

Pursuant to Ordinance No. 393-98 the following qualifications are required:

A person shall not be eligible for nomination for membership on an assessment appeals board unless he or she has a minimum of five years' professional experience in this state as one of the following: (1) certified public accountant or public accountant; (2) licensed real estate broker; (3) attorney; or (4) property appraiser accredited by a nationally recognized professional organization, or property appraiser certified by either the Office of Real Estate Appraiser or by the State Board of Equalization. Documentation of qualifying experience must be submitted with this application form. This requirement does not apply to incumbent board members nominated for appointments to their same seats.

Please state your qualifications (including occupation and education if applicable):

I earned my JD from San Francisco Law School in 2014. I earned my LLM in Wealth Management from Texas A&M in 2024.

Prior to attending law school I was a Realtor and loan originator for three years. I worked on selling, buying and financing residential and commercial properties. By working in that field I became familiar with the basics of property evaluation.

Upon graduating law school I practiced real estate law in San Francisco, with an emphasis on landlord/tenant law. I represented both landlords and tenants.

When I practiced real estate law I was involved with settlements and trials, which familiarized me with the trial process.

I served on the Sunshine Ordinance Task Force from 2006 to 2010. The SOTF is a semi-adjudicative body, so I am familiar with commission hearings.

(Applications must be submitted to aab@sfgov.org or the mailing address listed above)

Please state relevant business and/or professional experience:

Prior to attending law school I was a Realtor and loan originator for three years. I worked on selling, buying and financing residential and commercial properties. By working in that field I became familiar with the basics of property evaluation.

Upon graduating law school I practiced real estate law in San Francisco, with an emphasis on landlord/tenant law. I represented both landlords and tenants.

When I practiced real estate law I was involved with settlements and trials, which familiarized me with the trial process.

I served on the Sunshine Ordinance Task Force from 2006 to 2010. The SOTF is a semi-adjudicative body, so I am familiar with commission hearings.

Please state civic activities:

I served on the Sunshine Ordinance Task Force from 2006 to 2010. The SOTF is a semi-adjudicative body, so I am familiar with commission hearings.

I am a volunteer attorney with the Aids Legal Referral Panel helping people with estate planning issues.

I also work on the low-fee panel at the San Francisco Bar Association, helping people of limited means with their estate plans.

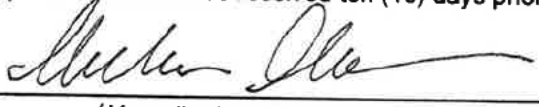
I am a member of the Castro Merchants Association and the Peninsula Chapter of the Asian Real Estate Association of America.

Would you be able to attend Day Meetings? ☒ Yes ☐ No Evening Meetings? ☒ Yes ☐ No

How many days a week would you be available for hearings? 5 How many evenings a week? 5

Have you attended an Assessment Appeals Board meeting? ☒ Yes ☐ No

An appearance before the Rules Committee may be required at a scheduled public hearing, prior to the Board of Supervisors considering the recommended appointment. Applications should be received ten (10) days prior to the scheduled public hearing.

Date: 8/29/2025 Applicant's Signature: 

(Manually sign or type your complete name).

NOTE: by typing your complete name, you are hereby consenting to use of electronic signature)

PLEASE NOTE: This application will be retained for one year. Once completed, this form, including all attachments, becomes public record.

FOR OFFICE USE ONLY:

Appointed to Seat #: _____ Term Expires: _____ Date Vacated: _____

CALIFORNIA FORM 700
 FAIR POLITICAL PRACTICES COMMISSION

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A Public Document

 Date Initial Filing Received
Filing Official Use Only

 E-Filed
 11/25/2024
 14:04:10

 Filing ID:
 212544509

Please type or print in ink.

NAME OF FILER	(LAST)	(FIRST)	(MIDDLE)
Goldman, Nicholas			

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

City and County of San Francisco

Division, Board, Department, District, if applicable

Your Position

Assessment Appeals Board

Member

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)☐ State☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner
(Statewide Jurisdiction)☒ Multi-County CA☒ County of San Francisco☒ City of San Francisco☐ Other _____**3. Type of Statement (Check at least one box)**☐ Annual: The period covered is January 1, 2023 through December 31, 2023.☐ Leaving Office: Date Left ____/____/____
(Check one circle)

-or-

The period covered is ____/____/____, through December 31, 2023.

☐ The period covered is January 1, 2023 through the date of leaving office.☒ Assuming Office: Date assumed 11 / 20 / 2024☐ The period covered is ____/____/____, through the date of leaving office.☐ Candidate: Date of Election _____ and office sought, if different than Part 1: _____**4. Schedule Summary (required)**► Total number of pages including this cover page: 3**Schedules attached**☐ Schedule A-1 - Investments - schedule attached☐ Schedule C - Income, Loans, & Business Positions - schedule attached☒ Schedule A-2 - Investments - schedule attached☐ Schedule D - Income - Gifts - schedule attached☒ Schedule B - Real Property - schedule attached☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or-

☐ None - No reportable interests on any schedule**5. Verification**

MAILING ADDRESS	STREET	CITY	STATE	ZIP CODE
(Business or Agency Address Recommended - Public Document)				

San Francisco

CA

94102

DAYTIME TELEPHONE NUMBER

E-MAIL ADDRESS

()

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 acknowledge this is a public document.

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

 Date Signed 11/25/2024
 (month, day, year)

 Signature Nicholas Goldman
 (File the originally signed paper statement with your filing official.)

SCHEDULE A-2

Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Goldman, Nicholas

1. BUSINESS ENTITY OR TRUST

Nicholas Goldman Law

Name

San Francisco, CA 94114

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☒ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

Law Firm

FAIR MARKET VALUE

- ☐ \$0 - \$1,999
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☒ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 ACQUIRED 23 DISPOSED 23
NATURE OF INVESTMENT
☐ Partnership ☒ Sole Proprietorship ☐ Other

 YOUR BUSINESS POSITION Owner
2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- ☐ \$0 - \$499 ☐ \$10,001 - \$100,000
☐ \$500 - \$1,000 ☒ OVER \$100,000
☐ \$1,001 - \$10,000

3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)
☒ None or ☐ Names listed below

4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

 Name of Business Entity, if Investment, or
 Assessor's Parcel Number or Street Address of Real Property

 Description of Business Activity or
 City or Other Precise Location of Real Property

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 ACQUIRED 23 DISPOSED 23
NATURE OF INTEREST
☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold Yrs. remaining ☐ Other

☐ Check box if additional schedules reporting investments or real property are attached

1. BUSINESS ENTITY OR TRUST

Name

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS
FAIR MARKET VALUE

- ☐ \$0 - \$1,999
☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 ACQUIRED 23 DISPOSED 23
NATURE OF INVESTMENT
☐ Partnership ☐ Sole Proprietorship ☐ Other

YOUR BUSINESS POSITION

2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- ☐ \$0 - \$499 ☐ \$10,001 - \$100,000
☐ \$500 - \$1,000 ☐ OVER \$100,000
☐ \$1,001 - \$10,000

3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)
☐ None or ☐ Names listed below

4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

 Name of Business Entity, if Investment, or
 Assessor's Parcel Number or Street Address of Real Property

 Description of Business Activity or
 City or Other Precise Location of Real Property

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 ACQUIRED 23 DISPOSED 23
NATURE OF INTEREST
☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold Yrs. remaining ☐ Other

☐ Check box if additional schedules reporting investments or real property are attached

Comments:

SCHEDULE B

Interests in Real Property

(Including Rental Income)

Name

Goldman, Nicholas

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

3876 18th Street, #104

CITY

San Francisco

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☐ \$10,001 - \$100,000☒ \$100,001 - \$1,000,000☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/23

ACQUIRED

____/____/23

DISPOSED

NATURE OF INTEREST

☐ Ownership/Deed of Trust☐ Easement☐ Leasehold _____
Yrs. remaining☒ Life Estate

Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

☐ \$0 - \$499☐ \$500 - \$1,000☐ \$1,001 - \$10,000☐ \$10,001 - \$100,000☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☐ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

____/____/23

ACQUIRED

____/____/23

DISPOSED

NATURE OF INTEREST

☐ Ownership/Deed of Trust☐ Easement☐ Leasehold _____
Yrs. remaining☐ _____
Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

☐ \$0 - \$499☐ \$500 - \$1,000☐ \$1,001 - \$10,000☐ \$10,001 - \$100,000☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

* You are not required to report loans from a commercial lending institution 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*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000☐ \$1,001 - \$10,000☐ \$10,001 - \$100,000☐ OVER \$100,000☐ Guarantor, if applicable

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

_____% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000☐ \$1,001 - \$10,000☐ \$10,001 - \$100,000☐ OVER \$100,000☐ Guarantor, if applicable

Comments:

