Committee Item No. _____8____ Board Item No. _____15____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Rules Committee

Date October 31, 2013

Board of Supervisors Meeting

Date <u>11/19/13</u>

Cmte Board

	Motion Resolution Ordinance Legislative Digest Budget and Legislative Analyst Report Youth Commission Report Introduction Form Department/Agency Cover Letter and/or Report MOU Grant Information Form Grant Budget Subcontract Budget Contract/Agreement Form 126 – Ethics Commission Award Letter Application Public Correspondence
OTHER	(Use back side if additional space is needed)
	Form 7 00
Complete	d by: Linda Wong Date October 28, 2013

Completed by:_	Linda Wong	Date	October 28	8 <u>, 2013 </u>
Completed by:	L.w.	Date	1117/13	S

FILE NO. <u>131047</u>

MOTION NO.

[Appointments – Assessment Appeals Board No. 1]

Motion appointing Jeffrey Morris and Eugene Valla, terms ending September 5, 2016, to the Assessment Appeals Board No. 1.

MOVED, That the Board of Supervisors of the City and County of San Francisco does hereby appoint the hereinafter designated persons to serve as members of the Assessment Appeals Board No. 1, pursuant to the provisions of the Revenue and Taxation Code, Section 1623, and the San Francisco Administrative Code, Sections 2B.1 through 2B.11, for the terms specified:

Jeffrey Morris, seat 1, succeeding himself, term expired, must meet the eligibility criteria set forth in California Revenue and Taxation Code, Section 1624.05. Must have a minimum of five years professional experience in the State of California as one of the following: Certified Public Accountant (CPA) or Public Accountant (PA); licensed Real Estate Broker; Attorney; or a Property Appraiser accredited by a nationally recognized professional organization, or Property Appraiser certified by the Office of Real Estate Appraisers, for the unexpired portion of a three-year term ending September 5, 2016.

Eugene Valla, seat 4, succeeding Gregory Blaine, term expired, must meet the eligibility criteria set forth in California Revenue and Taxation Code, Section 1624.05. Must have a minimum of five years professional experience in the State of California as one of the following: Certified Public Accountant (CPA) or Public Accountant (PA); licensed Real Estate Broker; Attorney; or a Property Appraiser accredited by a nationally recognized professional organization, or Property Appraiser certified by the Office of Real Estate Appraisers, for the unexpired portion of a three-year term ending September 5, 2016.

Rules Committee

BOARD OF SUPERVISORS

Assessment Appeals Board City and County of San Francisco (415) 554-6778 Fax (415) 554-6775

2.



City Hall, Room 405 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102-4697

Complete and return this ori	ginal Application to the Asses	sment Appeals Board
Application for Appointment to (Please circle one)	: Board 1 or Board 2 or Board 3 or	Board 1 Alternate Board 2 Alternate Board 3 Alternate
Enter your name, mailing address and daytime teleph for public review, you may list your business/office ac other personal contact information.	none number in the spaces provided Idress, telephone number and e-ma	 Because this form is a document available il address in lieu of your home address or
Do you authorize release of your private/person	al information? 🕅 ves [no
Name: JEFFREY J. MORRIS	Home Address:	JEFFERSON SDREED
City: SAN FRANCISCO	State: CA ·	Zip code: 94/23
Business Address: (SAME)	City:	State: Zip Code:
		Fax #: 415 929. 9511
	il Address:	DSBCGWBAL. NEL
Are you a United States citizen, or a resident all	ien who is eligible for and has ap	oplied for citizenship? 🔀 Yes 🔲 No
Have you ever been convicted of a felony in this would be a felony? (If yes, please attach a statement described of the conviction(s), and the conviction(s).	ibing the offense(s) for which yo	
Pursuant to Ordinance No. 393-98 the follow	ring qualifications are required	1:
A person shall not be eligible for nomin she has a minimum of five years' professional e accountant or public accountant; (2) licensed re nationally recognized professional organization, Appraiser or by the State Board of Equalization application form. This requirement does not ap same seats.	experience in this state as one of al estate broker; (3) attorney; or , or property appraiser certified b . Documentation of qualifying ex	f the following: (1) certified public (4) property appraiser accredited by a by either the Office of Real Estate xperience must be submitted with this
Please state your qualifications: CURRENT		VE SINCE 9-1-1001-
<u>(IE MBER_ALPRAISAL_INST/TU</u> Please state your business and/or professional DVISOR, <u>APPRAISER, BROKER_A</u>		REACESTATE EXECUTIV E,
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Other Personal Information (optional) SEC /		TTER ANT RESUME
		ng meetings? X Yes No
How many days a week would you be available		nany evenings a week?
Have you attended an Assessment Appeals Bo		<u></u>
Appearance before the RULES COMM Please Note: Yo	MITTEE is a requirement before our application will be retained for	
0	ant's Signature:	GANNA
For Office Use Only: Appointed to Board #:	Seat #: ////	Term Expires:
	369	Revised July 2013

JJM ASSOCIATES

August 1, 2013

Rules Committee of the Board of Supervisors C/O Assessment Appeals Board Administrator City Hall, Room 405 San Francisco CA 94102

Attention: Supervisors Yee, Breed and Cohen

RE: Reappointment to the Assessment Appeals Board

Dear Supervisors

I have served on Board 1 of the Assessment Appeals Board since September 6, 2007. I seek your reappointment recommendation for a new three year term to the full Board of Supervisors. I am well qualified to continue in this position for the following reasons.

- I have read, assimilated and follow all relevant guidelines and laws from the State Board of Equalization, Revenue and Taxation Code Sections and Assessment Appeals Manual.
- Applied my over 35 years of institutional investment real estate management experience to determine equitable valuation for assessment purposes.
- Worked very professionally in a Board 1 leadership role with the AAB Administrator Dawn Duran and her staff, Board City Attorney Marie Blitz, Assessor Carmen Chu's office, and commercial property owners and their legal and appraisal representatives.
- Have the support of Administrator Duran and fellow Board I members to be reappointed.
- Have more than the requisite qualifications to serve, as outlined on the attached Application and Resume, including: licensed real estate broker, member of the Appraisal Institute (MAI) and the above mentioned 35 years of sophisticated investment real estate advisory, valuation, financing and acquisition experience.

Therefore, I would very much appreciate your support in my reappointment to Board 1 of the Assessment Appeals Board. I will be present and available for any questions at your upcoming meeting of the Kules Committee. Thank you for your consideration.

Sincerely yours,

Jefferson Street San Francisco, CA 94123 T: (415) 606-9580 929-9511 W <u>@sbcglobal.net</u> F: (414)

Resume of Jeffrey J. Morris

Qualifications

March, 2007--

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, portfolioproperty management, transaction, financing and valuation

Business/Professional Experience

JJM Associates, San Francisco

Independent real estate consulting and investment

1981-Feb. 2007 BlackRock Realty, San Francisco (and predecessor firms) Director-Portfolio Manager of Apartment Value Funds: over \$900 million in U.S. apartment investments.

> 1991-1999 Managing Director, Metric Property Management: \$2.5 billion national portfolio of multi family, office, industrial and retail properties.

1981-1990 Vice President/Senior Vice President of Portfolio Management.

1971-1980

2007-

1989-2001

Coldwell Banker Management Corporation, San Francisco Vice President, Appraisal- Consultation Service

Education

BA Political Science Stanford University, 1967

Civic-Charitable Activities:

Member, Assessment Appeals Board, City and County of San Francisco [three year term]

Board of Directors, Golden Gate Park Stables, Inc.

[Concession with the San Francisco City Recreation and Park Department]

Current Marina Community Association; San Francisco Zoological Society; California Academy of Sciences; American Conservatory Theatre (ACT); Olympic Club Foundation

Jefferson Street, San Francisco CA 94123

i)sbcglobal.net

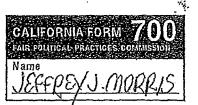
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. Schedule Summary Check applicable schedules or "None."	► Tot	al number of pages li	acluding this cov	ver page: 15
Schedule A-1 - Investments - schedule at Schedule A-2 - Investments - schedule at Schedule B - Real Property - schedule at	tached tached	Schedule C - Income	, Loans, & Business - Gifis - schedule a	Positions - schedule attached
	None - No reportable inle	erests on any schedule		
S. Verification · JCFF	RSON ST.	SAN FRANCI	SCO CA.	94123
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SCHEDULE A-1 Investments Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%) Do not attach brokerage or financial statements.



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FPPC Form 700 (2012/2013) Sch. A-1 FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov .

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FPPC Advice Email: advice @fpbc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

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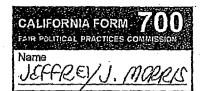
FPPC Form 700 (2012/2013) Sch. A-1 FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

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CALIFORNIA FORM FAIR FOLITICAL PRACTICES OF Name JEFPLEY J.M

Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%) Do not attach brokerage or financial statements.

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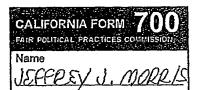
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CALIFORNIA FORM 700 FAIN POLITICAL PRACTICES COMMISSION Name JEFFREY J. MORRIS

Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%) Do not attach brokerage or financial statements.

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Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%) Do not attach brokerage or financial statements.

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CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES - OF THESONIA Name JEFFREY J. MORRA

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

Do not attach brokerage or financial statements.

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Assessment Appeals Board City and County of San Francisco (415) 554-6778 Fax (415) 554-6775



City Hall, Room 405 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102-4697

Complete and return this original Application to the Assessment Appeals Board
Application for Appointment to:Board 1orBoard 1 Alternate(Please circle one)Board 2orBoard 2 AlternateBoard 3orBoard 3 Alternate
Enter your name, mailing address and daytime telephone number in the spaces provided. Because this form is a document available for public review, you may list your business/office address, telephone number and e-mail address in lieu of your home address or other personal contact information.
Do you authorize release of your private/personal information? 🔀 yes 🔲 no
Name: EUGENE L. Valla Home Address: - DARIGI WAY
City: <u>SAN FRANCISCO</u> State: <u>CA</u> Zip code: <u>94127</u> -2522
Business Address:
Home Phone: 415 999 8513 Fax #: 415 421 8669
Pager #: N/A E-Mail Address: @ LUNIC, COM
Are you a United States citizen, or a resident alien who is eligible for and has applied for citizenship? 🔲 Yes 🔲 No
Have you ever been convicted of a felony in this state, or convicted of any offense which, if committed in this state, would be a felony? Yes No (If yes, please attach a statement describing the offense(s) for which you have been convicted, the date of the conviction(s), and the court(s) that convicted you.)
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) altorney; 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 appointment to their same seats.
Please state your gualifications: <u>CALLEORNIA CPA; former Methoder ships Included</u> ULI, BOMA, LANDA ALPHA AS WELL AS CIVIC AND CHARITABLE DREAD FATTERS,
Please state your business and/or professional experience: FIRIT YEARS WITH THE LURIE CUNTRY ASALING WITH WHIL BETHTE FINANCIAL, REQUISITIONS, PISTOSITIONS & HUMMAGENGEN.
Occupation: ROMAGE VOLUNTER/INSSTON/CONSCIENTING/AN
Civic Activities: SOLVICE + VULUNTRESPING AT NON-PROFILS (SCIDDES, CBO'S)
Ethnicity (optional): CANCASIAN Sex (optional): XM CF
Other Personal Information (optional) SGT ATTACHED 'BIO'
Would you be able to attend Day Meetings? Xes No Evening meetings? Yes No How many days a week would you be available for hearings? Yes How many evenings a week? Yes Have you attended an Assessment Appeals Board meeting? Xes No
Appearance before the RULES COMMITTEE is a requirement before any appointment can be made. Please Note: Your application will be retained for one year,
Date: August 22, 2013 Applicant's Signature: digli Wille
For Office Use Only: Appointed to Board #: Seat #: Term Expires: Revised July 2013

Bio for Gene Valla

Eugene L. Valla was born and raised in Watsonville, California. After graduating Watsonville High School in 1958, Gene enlisted in the U.S. Navy. He received his Honorable Discharge in August, 1962. In fall of 1962 he enrolled at Cabrillo Junior College; then, after completing studies there, transferred to and graduated from San Jose State in 1967 with a BS in Accounting and Finance.. He is a California Certified Public Accountant.

After graduation, Gene went to work for Lybrand, Ross Bros. & Montgomery in their Oakland, California office. Lybrand's as it was called, was, at the time, one of the Big-8 CPA firms in the country. Gene worked there from June 1966 until August 1969 and was a Senior Auditor.

His second employer, Systech Financial Corporation, was located in Walnut Creek, California. They were a garden-style apartment developer that, in addition to designing and constructing the apartment buildings, also formed the partnerships for ownership of the properties. The company also had a property management subsidiary. Gene served as Assistant Controller and worked there from August 1969 until October 1972.

In October 1972 Gene joined The Lurie Company as Controller. The Lurie Company was a privately-held, commercial real estate company with office buildings in the cities of San Francisco and Chicago as well as industrial properties located in communities nearby those two cities. Gene's responsibilities grew to Vice President and, later, to Executive Vice President. In 2003, Gene became President of the company. Gene was also a director of the company. Gene is also an officer and director of the Louis R. Lurie Foundation.

Gene and his wife, Suzanne, both work with and/or contribute to a number of youth oriented non-profit community based organizations and schools in San Francisco as well as in the Northern Sonoma County area.

Gene's civic and community involvement includes or has included the Bay Area Sports Hall of Fame, Lambda Alfa, AICPA, California Society of CPA's, ULI, BOMA PAC, and related real estate organizations. Memberships include The Olympic Club, the Bay Club, Park Point in Healdsburg and Pumpkin Ridge Golf Club near Portland, Oregon.

August, 2013

CALIFORNIA FORM 700

A PUBLIC DOCUMENT

STATEMENT OF ECONOMIC INTERESTS

Dale Received

COVER PAGE

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Please type or print in Ink.				
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1. Office, Agency, or Court				
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Division, Board, Department, District, if applicable		Your Position		
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► If filing for multiple positions, list below or on an all	achmeni.			
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-or- The period covered is/ December 31, 2012,	, through	O The period cov leaving office.	ared is Januar	y 1, 2012, through the date of
Assuming Office: Date assumed		O The period cov the date of leas		/, through
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Schedula B - Real Property - schedule alleched		Schedule E - Income -	sitts — Travel I	Payments - schedule allached
None	• No reportable interests	s on any schedule		
5. Verification				
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(Dusiness or Agency Address Recommended - Public Document)		· ·		
arion Way Daytime telephone number	San Francisco	O HAR ADDRESS (OPTIONAL)	CA	94127
(415)				
I have used all reasonable diligence in preparing this sh herein and in any alliached schedules is true and comp			best of my kn	owledge the information contained
I certify under penalty of perjury under the laws of		-	e and correct	
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(involva) tax	<u> </u>		FPPC A	FPPC Form 700 (2012/201 dvice Email: advice@ippc.ca.gu
		FPPC Tol	Free Helplin	2: 866/275-3772 www.lppc.ca.go
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Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

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<u>// 12</u> <u>// 12</u>	
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Comments: _

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

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Name

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omo	Name
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ddress (Business Address Accepteble)	Address (Business Address Acceptable)
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Page 1 of 1

Department of Consumer Affairs / California Board of Accountancy

CALIFORNIA BOARD OF ACCOUNTANCY

Licensee Name:EUGENE LLicense Type:Certified PuLicense Number:14901License Status:INACTIVEExperience Completed:A DefinitionExpiration Date:April 30, 20Issue Date:October 24Address:— DARIECity:SAN FRANState:CAZip:94127-2522County:SAN FRANDisciplinary Actions/License Restrictions: No

EUGENE LEONARD VALLA Certified Public Accountant 14901. INACTIVE Definition A Definition April 30, 2014 October 24, 1969 DARIEN WAY SAN FRANCISCO CA 94127-2522 SAN FRANCISCO

Status Definition - Inactive

An inactive license is current: however, the licensee is not required to meet the continuing education requirements and they may not engage in the practice of public accountancy.

No records returned

This information is updated Monday through Friday - Last updated: OCT-01-2013

Disclaimer

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Back

http://www2.dca.ca.gov/pls/wllpub/WLLQRYNA\$LCEV2.QueryView?P_LICENSE_NUMBER=14901... 10/2/2013

Assessment Appeals Board City and County of San Francisco (415) 554-6778 Fax (415) 554-6775



City Hall, Room 405 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102-4697

Complete and return this original Application to the Assessment Appeals Board
Application for Appointment to: (Please circle one) Board 2 Board 2 Board 2 Board 3 Board 3 Boa
Enter your name, mailing address and daylime telephone number in the spaces provided. Because this form is a document available for public review, you may list your business/office address, telephone number and e-mail address in lieu of your home address or other personal contact information.
Do you authorize release of your private/personal information? 🔲 yes 🛄 no
Name: Shawn Ridgell Home Address: Broderick Street
Name: <u>Shawn Ridgell</u> Home Address: <u>Broderick Street</u> City: <u>San Francisco</u> <u>State:</u> <u>C4</u> <u>Zip code:</u> <u>G4117</u> Business Address: <u>2128 Broadway</u> <u>City: <u>Oak land</u> <u>State:</u> <u>C4</u> <u>Zip Code:</u> <u>G4117</u></u>
Business Address: 2128 Broadway City: Oakland State: CA Zip Code: 9.4612
Home Phone: (415- Work Phone: (50-) 986-1300 Fax # (570) 986-1301
Home Phone: (715) Work Phone: $(51-) \frac{7}{7} \frac{6-1305}{51-305}$ Fax #: $(570) \frac{976-1301}{7}$ Pager #: $\frac{119}{51-30}$ E-Mail Address: $\frac{51-305}{51-30}$ $\frac{976-1301}{50-1301}$
Are you a United States citizen, or a resident alien who is eligible for and has applied for citizenship? 🗹 Yes 🔲 No
Have you ever been convicted of a felony in this state, or convicted of any offense which, if committed in this state, would be a felony? Yes Woo (If yes, please attach a statement describing the offense(s) for which you have been convicted, the date of the conviction(s), and the court(s) that convicted you.)
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 appointment to their same seats.
Please state your qualifications: I an an antiforney with 15 years of experience. I also have 5 years of experience as an Granitate
as an artiformal. Please See affacted resume.
Occupation: Attorney Education: B.S., T.O. From USF.
Civic Activities: Bound member, USF Alumni, Volunteer Attorney, ALRP
Ethnicity (optional): Sex (optional): F
Other Personal Information (optional)
Would you be able to attend Day Meetings? How many days a week would you be available for hearings? Have you attended an Assessment Appeals Board meeting? Yes UNO
Appearance before the RULES COMMITTEE is a requirement before any appointment can be made.
Date: 9/19/113 Please Note: Your application will be retained for one year. Applicant's Signature: Output
For Office Use Only: Appointed to Board #: Seat #: Term Expires: Revised July 2013

EDUCATION

UNIVERSITY OF SAN FRANCISCO SCHOOL OF LAW

Juris Doctor Degree, May 1996 Staff Member, *Maritime Law Journal* Tutor in the *Academic Support Program*

UNIVERSITY OF SAN FRANCISCO

Bachelor of Science in Business Administration, May 1991 Member of the Disciplinary Hearing Committee Named Who's Who Among Students in American Universities

WORK EXPERIENCE

MANAGING ATTORNEY, JANUARY, 2007- PRESENT

RIDGELL & LAWLOR, LLP; Oakland, CA

Client representation in civil litigation and business matters. Areas of practice include contracts, consumer litigation, business litigation, business formation, insurance litigation, personal injury, and elder abuse. Client representation in mediations, arbitrations, administrative hearings, and trial.

ARBITRATOR, JANUARY, 2008-PRESENT

FINANCIAL INDUSTRY REGULATORY AUTHORITY (FINRA); San Francisco, CA

Responsible for hearing and deciding disputes arising out of breach of contract and employment law matters within the securities industry. Reviewed pleadings and other documents in evaluating disputes. Issued rulings on discovery matters.

ATTORNEY, 2001-2006

CHARLES SCHWARTZ, P.C.; Oakland, CA

Client representation in civil litigation and business matters. Areas of practice include contracts, consumer litigation, business litigation, business formation, insurance litigation, personal injury, and elder abuse. Represented clients in mediations, arbitrations, administrative hearings, and trial. Assumed sole responsibility for own case files.

LEGAL EDITOR, 1999-2006

CONTINUING EDUCATION OF THE BAR; Oakland, CA Conducted extensive legal research on various legal subjects, including areas involving business law, civil litigation, real property, and estate planning. Assisted in editing legal publications.

ATTORNEY, 1999-2001

SHAWN RIDGELL, ATTORNEY AT LAW; San Francisco, CA Client representation in civil litigation and business matters.

LAW CLERK, 1997-1998

LAW OFFICES OF JOHN D. WINER; San Francisco, CA Participated in Civil discovery, including preparing clients for Deposition testimony. Drafted legal memoranda.

LAW CLERK, 1996-1997

FRANCOIS SORBA, ATTORNEY AT LAW; San Mateo, CA Conducted legal research on real estate and construction matters. Drafted discovery requests and legal memoranda.

LAW CLERK, FEBRUARY 1996 - MAY, 1996

RICE, FOWLER, BOOTH, & BANNING; San Francisco, CA Participant in the law firm's externship program. Conducted legal research on maritime issues. Drafted Motions and legal memoranda. Attended depositions.

LAW CLERK, JUNE 1995-NOVEMBER 1995

RICHTER, SENN & PALUMBO; San Francisco, CA Conducted legal research on real estate, construction, and business matters. Drafted Motions and legal memoranda.

PROFESSIONAL ASSOCIATIONS San Francisco Bar Association, Member Alameda County Bar Association, Member California Bar Association, Member

VOLUNTEER ACTIVITIES Volunteer Attorney, Bar Association of San Francisco Volunteer Attorney, AIDS Legal Referral Service (ALRP) University of San Francisco Alumni Board of Directors

AWARDS

Outstanding Volunteer in Public Service Award, Bar Association of San Francisco, 2004

Award for Outstanding Volunteer, AIDS Legal Referral Service, 2009

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ATTORNEY SEARCH

Shawn Ridgell - #201179

Current Status: Active

This member is active and may practice law in California.

See below for more details.

Profile Information

The following information is from the official records of The State Bar of California.

Bar Number:	201179		
Address:	Ridgell & Lawlor LLP	Phone Number:	(510) 986-1300
	2128 Broadway Oakland, CA	Fax Number:	(510) 986-1301
	94612 Map it	e-mail:	sridgell@aol.com
ີວunty:	Alameda	Undergraduate School:	Univ of San Francisco; San Francisco CA
District:	District 1		· · · · ·
Sections:	Business Law	Law School:	U of San Francisco SOL; San Francisco CA

Status History

Effective Date	Status Change
Present	Active
6/7/1999	Admitted to The State Bar of California
Explanation of memb	er status

Actions Affecting Eligibility to Practice Law

Disciplinary and Related Actions

Overview of the attorney discipline system...

This member has no public record of discipline.

Administrative Actions

This member has no public record of administrative actions.

. (New Search »

Wednesday, October 2, 2013

Assessment Appeals Board City and County of San Francisco (415) 554-6778 Fax (415) 554-6775



City Hall, Room 405 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102-4697

Complete and return this original Applipation to the Assessment Appeals Board
Application for Appointment to: (Please circle one) Board 1 Board 1 Board 1 Board 2 Board 2 Board 3 Or Board 1 Alternate Board 3 Or Board 3 Alternate
Enter your name, mailing address and daytime telephone number in the spaces provided. Because this form is a document available for public review, you may list your business/office address, telephone number and e-mail address in lieu of your home address or other personal contact information.
Do you authorize release of your private/personal Information? i yes Dro Cwilton & G-opcilett / 14 Name: Kristine Neison Home Address: base Bring was factored
city: San Srancisco State: CA Zip code: 94/17
Business Address: 601 Buena Vistace City: SF State: CA Zip Code: 94/17
Home Phone: Work Phone <u>415-706-0995</u> Fax #:
Pager #: E-Mail Address: Kristya) wleffers.com
Are you a United States citizen, or a resident allen who is eligible for and has applied for citizenship? 📉 Yes 🗌 No
Have you ever been convicted of a felony in this state, or convicted of any offense which, if committed in this state, would be a felony? Yes No (If yes, please attach a statement describing the offense(s) for which you have been convicted, the date of the conviction(s), and the court(s) that convicted you.)
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 appointment to their same seats.
Please state your qualifications: <u>Certified Real Estate Appraiser</u>
Please state your business and/or professional experience: Real Estate Appraiser, Chief Appraiser, Review Appraiser Real Estate Agent
Occupation: Appralser, Keal Estate Agent Education: BA UGLA
Civic Activities: Randall Museum, SPEAK, CSB-School
Ethnicity (optional): Sex (optional): 🔲 M 📉 F
Other Personal Information (optional)
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? Yes Yes How many evenings a week? Yes Have you attended an Assessment Appeals Board meeting? Yes No No
Appearance before the RULES COMMITTEE is a requirement before any appointment can be made. Please Note: Your application will be retained for one year.
Date: <u>9/9/2013</u> Applicant's Signature:
For Office Use Only: Appointed to Board #: Seat #: Term Expires:

Kristy Nelson

kristy@mleffers.com (415) -

<u>Skills</u>

Professional Experience

Independent Appraiser and Real Estate Sales Agent

1995-Present

- Appraise apartments, commercial properties, condominiums, income properties and single family residences
- Represent buyers and sellers in real estate transactions
- Lease and manage residential and commercial properties

Senior Staff Real Estate Appraiser, San Francisco Federal, San Francisco, CA 1993-1995

- Appraised apartments, condominiums and income properties
- Planned unit developments and single family residences
- Reviewed apartment and residential appraisals
- Supervised staff reviewers

Regional Chief Appraiser, Foster Ousley Comley, Walnut Creek, CA 1992-1993

- Managed staff reviewers
- Determined final review value for residential properties, condominiums, income properties and planned unit developments
- Provided technical support and training

Independent Appraiser, Johnson O'Neil & Associates; Michael J. VIzzini Associates, Los Angeles, CA 1990-1992

- Prepared narratives for commercial properties and vacant land appraisals
- Appraised apartments, condominiums and residential properties
- Prepared relocation and proposed construction appraisals

Senior Staff Real Estate Appraiser, Home Savings America, Palos Verdes, CA 1986-1991

- Appraised condominiums, planned unit developments and single family residences
- Appraisals ranged in price from \$90,000 to \$4,000,000
- Appraised multi-unit income producing properties
- Reviewed single residences and income property appraisals
- Assisted in office management

Leasing Consultant, Dorn and Company, Los Angeles, CA 1984-1986

- Located office and real estate space for commercial tenants
- Aided prospective tenants in space planning and building design
- Negotiated commercial leases
- Published San Fernando Valley Commercial Leasing Activity in WESTERN REAL ESTATE NEWS, December 20, 1986

Licenses

Certified General Appraisal License #AGOO7334 California Real Estate Sales License #00884857

CALIFORNIA FORM 700FAIR POLITICAL PRACTICES COMMISSION A PUBLIC DOCUMENT

STATEMENT OF ECONOMIC INTERESTS

Date Received

COVER PAGE

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

Do not atlach brokerage or financial statements.

Kristine Nelson

► NAME OF BUSINESS ENTITY PGE	NAME OF BUSINESS ENTITY Cisco
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
electricity	Computers
FAIR MARKET VALUE	FAIR MARKET VALUE
Image: Constraint of the state of	Image: State of the state
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)	Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/ <u>/ 12/ 12</u> ACQUIRED DISPOSED	<u>/ / 12/ 12</u> ACQUIRED DISPOSED
NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Intel	Southern Copper
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Chip maker	Соррег
FAIR MARKET VALUE	FAIR MARKET VALUE
¥2,000 - \$10,000 \$10,001 - \$100,000 \$100,001 - \$1,000,000 Over \$1,000,000	
NATURE OF INVESTMENT	NATURE OF INVESTMENT
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	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Computers	
FAIR MARKET VALUE	FAIR MARKET VALUE
✓ \$2,000 - \$10,000	\$10,001 - \$10,000 \$10,000
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IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
<u> </u>	

SCHEDULE A-2 Investments, Income, and Assets of Business Entities/Trusts CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION Name

Kristine Nelson

Ownership	interest i	s 10%	or Greater)	

► 1. BUSINESS ENTITY OR TRUST	► 1. BUSINESS ENTITY OR TRUST
Leffers Family Trust	
Name	Name
Address (Business Address Acceptable)	Address (Business Address Acceptable)
Check one	Check one
Trust, go to 2 Business Entity, complete the box, then go to 2	Trust, go to 2 Business Entity, complete the box, then go to 2
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$0 - \$1,999 / / 12 \$2,000 - \$10,000 / / 12 \$10,001 - \$100,000 ACQUIRED \$100,001 - \$1,000,000 Over \$1,000,000	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$0 - \$1,999 /_/12 \$2,000 - \$10,000 /_/12 \$10,001 - \$100,000 ACQUIRED \$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)	 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 ☑ \$1,001 - \$100,000 □ \$1,001 - \$10,000	\$0 - \$499 \$10,001 - \$100,000 \$500 - \$1,000 OVER \$100,000 \$1,001 - \$10,000
INCOME OF \$10,000 OR MORE (Allach a separate sheet of accessory)	INCOME OF \$10,000 OR MORE (Attach a suparate sheet if necessary) None
► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST Check one box:	◆ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST Check one box:
INVESTMENT I REAL PROPERTY	
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property 287 Sanchez Street	Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property 565-567 Natoma street
Description of Business Activity or City or Other Precise Location of Real Property	Description of Business Activity or City or Other Precise Location of Real Property
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: □ \$2,000 - \$10,000	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000
NATURE OF INTEREST	NATURE OF INTEREST
Leasehold Other	Leasehold Other
Check box if additional schedules reporting investments or real property are attached	Check box if additional schedules reporting investments or real property are attached
Comments:	FPPC Form 700 (2012/2013) Sch. A-2 FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772_www.fppc.ca.gov

SCHEDULE B Interests in Real Property (Including Rental Income)

CALIFORNIA	FOR	M		0	
			-	-	
FAIR POLITICAL PRA	ACTICE	S CO	DIAMAIS	SID	N

Name

Kristine Nelson

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 62-64 Moss Street	 ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 621 Natoma Street
city San Francisco	CITY San Francisco
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000	FAIR MARKET VALUE IF APPLICABLE, LIST DATE; \$2,000 - \$10,000
NATURE OF INTEREST	NATURE OF INTEREST
Ownership/Deed of Trust	Ownership/Deed of Trust
Leasehold Other	Leasehold Duber
IF RENTAL PROPERTY, GROSS INCOME RECEIVED	IF RENTAL PROPERTY, GROSS INCOME RECEIVED
🗌 \$0 - \$499 🔲 \$500 - \$1,000 🔲 \$1,001 - \$10,000	50 - \$499 \$500 - \$1,000 \$1,001 - \$10,000
☑ \$10,001 - \$100,000 □ OVER \$100,000	☑ \$10,001 - \$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.	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.
П None	
	lending institutions made in the lender's regular course of without regard to your official status. Personal loans and iness must be disclosed as follows:
NAME OF LENDER"	NAME OF LENDER*
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
BUSINESS ACTIVITY, IF ANY, OF LENDER	BUSINESS ACTIVITY, IF ANY, OF LENDER
INTEREST RATE TERM (Months/Years)	INTEREST RATE TERM (Months/Years)
% [] None	% 🗋 None
HIGHEST BALANCE DURING REPORTING PERIOD	HIGHEST BALANCE DURING REPORTING PERIOD
\$ 500 - \$1,000 \$ 1,001 - \$10,000	☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
S10,001 - \$100,000	S10,001 - \$100,000 OVER \$100,000
Guarantor, il applicable	Guarantor, il applicable
Comments:	

FPPC Form 700 (2012/2013) Sch. B FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

SCHEDULE B

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION Name

Interests in Real Property (Including Rental Income)

23-25 Moss Street 1316-1318 Fullon Street CITV San Francisco San Francisco FARMARKET VALUE 12 ARM MARKET VALUE IF APPLICABLE, LIST DATE: 13 5000 - \$10,000 -/	CITY San Francisco CITY San Francisco CITY San Francisco CITY San Francisco FAR MARKET VALUE IF APPLICABLE, LIST DATE: Stadow 1: 00.000	CITY San Francisco Statos 1: 00.000	CITY San Francisco FAIR MARKET VALUE IF APPLICABLE, LIST DATE: 12,000 - \$10,000
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FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

CALIFORNIA FORM TAIR POLITICAL PRACTICES COMMISSION SCHEDULE B Name Interests in Real Property (Including Rental Income) Kristine Nelson ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 445-449 Tehama Street CITY CITY San Francisco FAIR MARKET VALUE IF APPLICABLE, LIST DATE: FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 2,000 - \$10,000 112 <u>/ 12</u> 12 s10,001 · \$100,000 \$10,001 - \$100,000 ACOUIRED DISPOSED ACQUIRED DISPOSED 100,001 - \$1,000,000 **\$100,001 - \$1,000,000** Øver \$1,000,000 Over \$1,000,000 NATURE OF INTEREST NATURE OF INTEREST Ownership/Deed of Trust Ownership/Deed of Trust Eesement Eesement Easement Leasehold Leasehold Yrs, remaining Other Yrs, remaining Other IF RENTAL PROPERTY, GROSS INCOME RECEIVED IF RENTAL PROPERTY, GROSS INCOME RECEIVED \$500 - \$1,000 \$0 - \$499 \$1,001 - \$10,000 \$0 - \$499 \$500 - \$1,000 1 \$1,001 - \$10,000 OVER \$100,000 OVER \$100,000 SOURCES OF RENTAL INCOME: If you own a 10% or greater SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of interest, list the name of each tenant that is a single source of income of \$10,000 or more. income of \$10,000 or more. None None None None You are not required to report loans from commercial lending institutions 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* NAME OF LENDER* ADDRESS (Business Address Acceptable) ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER BUSINESS ACTIVITY, IF ANY, OF LENDER INTEREST RATE TERM (Months/Years) INTEREST RATE TERM (Months/Years) None None .% None None % HIGHEST BALANCE DURING REPORTING PERIOD HIGHEST BALANCE DURING REPORTING PERIOD \$500 - \$1,000 \$500 - \$1,000 \$1,001 - \$10,000 \$1,001 - \$10,000 \$10,001 - \$100,000 OVER \$100,000 \$10,001 - \$100,000 OVER \$100,000

FPPC Form 700 (2012/2013) Sch. B FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

Guarantor, if applicable

Guarantor, if applicable

Comments: .

SCHEDULE C **CALIFORNIA FORM** FAIR POLITICAL PRACTICES COMMISSION Income, Loans, & Business Name Positions (Other than Gifts and Travel Payments) Kristine Nelson **1. INCOME RECEIVED** 1. INCOME RECEIVED NAME OF SOURCE OF INCOME NAME OF SOURCE OF INCOME Real Estate Commission ADDRESS (Business Address Acceptable) ADDRESS (Business Address Acceptable) 1669 Page Street BUSINESS ACTIVITY, IF ANY, OF SOURCE BUSINESS ACTIVITY, IF ANY, OF SOURCE YOUR BUSINESS POSITION YOUR BUSINESS POSITION **Buyers Agent** GROSS INCOME RECEIVED **GROSS INCOME RECEIVED** \$500 - \$1,000 \$1,001 - \$10,000 \$500 - \$1,000 \$1,001 - \$10,000 **\$10,001 - \$100,000** OVER \$100,000 \$10,001 - \$100,000 OVER \$100,000 CONSIDERATION FOR WHICH INCOME WAS RECEIVED CONSIDERATION FOR WHICH INCOME WAS RECEIVED Salary Spouse's or registered domestic partner's income Salary Spouse's or registered domestic partner's income Loan repayment Partnership Loan repayment Partnership Sale of _ Sale of ____ (Real property, car, boat, etc.) (Real property, car, bost, etc.) Commission or Rental Income, list each source of \$10,000 or more Commission or Rental Income, list each source of \$10,000 or more Other .__ Other . (Describe) (Describe) ► 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) None .% ADDRESS (Business Address Acceptable) SECURITY FOR LOAN None 🗌 Personal residence BUSINESS ACTIVITY, IF ANY, OF LENDER Real Property Street address HIGHEST BALANCE DURING REPORTING PERIOD 500 - \$1,000 City **\$1,001 - \$10,000** Guarantor S10,001 - \$100,000 OVER \$100,000 Other . (Describe) Comments: FPPC Form 700 (2012/2013) Sch. C

FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov



407

Business, Transportation & Housing Agency OFFICE OF REAL ESTATE APPRAISERS REAL ESTATE APPRAISER LICENSE

Kristine A. Nelson

has successfully met the requirements for a license as a residential and commercial real estate appraiser in the State of California and is, therefore, entitled to use the title:

"Certified General Real Estate Appraiser"

This license has been issued in accordance with the provisions of the Real Estate Appraisers' Licensing and Certification Law.

OREA APPRAISER IDENTIFICATION NUMBER: AG 007334

Effective Date:

Date Expires:

May 6, 2013 May 5, 2015

and & Martin

Jim Martin, Director, OREA

3007087

S DOCUMENT CONTAINS A TRUE WATERMARK - HOLD UP TO LIGHT TO SEE "CHAIN LINK"

RECEIVED AUG 1 6 2013

Assessment Appeals Board City and County of San Francisco (415) 554-6778 Fax (415) 554-6775



City Hall, Room 405 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102-4697

	Compl	ete and return this o	riginal Application to	thę Assess	sment Appeals Boa	ard
· .		n for Appointment i se circle one)	to: Board 1 Board 2 Board 3	or or or	Board 1 Alterna Board 2 Alterna Board 3 Alterna	ite
or public	ir name, mailing a review, you may l sonal contact info	list your business/office	phone number in the spa- address, telephone numb	ces provided. er and e-mail	Because this form is address in lieu of you	a document available Ir home address or
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			rk Phone: <u>415-44</u>			
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Are you	a United States	citizen, or a resident	alien who is eligible for	and has app	plied for citizenship	Yes 🗌 No
would be	e a felony? 🔲 \ (If yes, please a	Yes No ittach a statement des	his state, or convicted c cribing the offense(s) for court(s) that convicted	or which you		
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A Date:	8 15 2013	Please Note: `	Your application will be licant's Signature			_

STATEMENT OF ECONOMIC INTERESTS

Date Received Officer Use Only

COVER PAGE

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION A PUBLIC DOCUMENT

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3. Type of Statement	(Check at least one box)					
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SCHEDU	LE A-1 CALIFORNIA FORM 7(0)
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Time Warner Cable	Bank of America
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Cable	Banking
FAIR MARKET VALUE	FAIR MARKET VALUE
✓ \$2,000 - \$10,000 ■ \$10,001 - \$100,000	S2,000 · \$10,000
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NATURE OF INVESTMENT	NATURE OF INVESTMENT
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Partnership O Income Received of \$0 - \$499	Partnership O Income Received of \$0 - \$499
O Income Received of \$500 or More (Report on Schedule C)	O Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
1 12 1 12	1 12 1 12
ACQUIRED DISPOSED	ACQUIRED DISPOSED
> NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Intel Corporation	IBM
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Computers	Computers
FAIR MARKET VALUE	FAIR MARKET VALUE
\$2,000 - \$10,000 \$10,001 - \$100,000 \$100,001 - \$1,000,000 Over \$1,000,000	\$2,000 - \$10,000 \$10,001 - \$100,000 \$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
(Describe)	(Describe)
O Income Received of \$500 or More (Report on Schedule C)	O Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
1 12 1 12	/ / 12 / / 12
ACQUIRED DISPOSED	ACQUIRED DISPOSED
> NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Merck	Microsoft
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Pharmaceutical	Computer
FAIR MARKET VALUE	FAIR MARKET VALUE
S100,001 - \$1,000,000	S100,001 - \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock Other	Stock Olher
(Describe) Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)	(Describe) Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/ / 12 / / 12	. / / 12 / / 12
ACQUIRED DISPOSED	ACQUIRED DISPOSED
	ł

Comments: _

FPPC Form 700 (2012/2013) Sch. A-1 FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

SCHEDULE A-1 Investments

CALIFORNIA FORM 9 FAIR POLITICAL PRAC

Name

John M. Lee

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

Do not attach brokerage or financial statements.

NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Oracle Corporation	Qualcomm
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Software	Computer
FAIR MARKET VALUE	FAIR MARKET VALUE
S2,000 - \$10,000	S2,000 - \$10,000 S10,000
s100,001 - \$1,000,000	S100,001 - \$1,000,000
NATURE OF INVESTMENT	
(Describe)	(Describe)
Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)	Partnership O Income Received of \$0 • \$499 O Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/ / 12 / / 12	<u> </u>
ACQUIRED DISPOSED	ACQUIRED DISPOSED
NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
LSI Corporation	Times Warner
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Computers	Entertainment
FAIR MARKET VALUE	FAIR MARKET VALUE
✓ \$2,000 - \$10,000 ↓ \$10,001 - \$100,000	
S100,001 - \$1,000,000) \$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock Other	Stock Other
(Describe)	(Describe)
O Income Received of \$500 or More (Report on Schedule C)	O Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/ / 12 / 12	1 12 12 20 12
ACQUIRED DISPOSED	ACQUIRED DISPOSED
NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
FAIR MARKET VALUE	FAIR MARKET VALUE
S2,000 - \$10,000 \$10,001 - \$100,000	\$2,000 - \$10,000 \$10,000 \$10,000
S100,001 - \$1,000,000	S100,001 - \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
(Describe)	(Describe)
Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)	Partnership O Income Received of \$0 • \$499 O Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED
Comments:	·

FPPC Form 700 (2012/2013) Sch. A-1 FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

SCHEDULE	
Investments, Incom	e, and Assets
of Business Enti	ties/Trusts
(Ownership Interest is 10	0% or Greater) John M. Lee
► 1. BUSINESS ENTITY OR TRUST	>1. BUSINESS ENTITY OR TRUST
John M Lee and Lily T Lee Revocable Trust	John M Lee and Lily T Lee Revocable Trust
Name	Name
1 Letterman Drive, #C500, San Francisco, CA 94129 Address (Business Address Acceptable)	1 Letterman Drive, #C500, San Francisco, CA 94129 Address (Business Address Acceptable)
Check one	Check one
Trust, go to 2 Business Entity, complete the box, then go to 2	Trust. go to 2 Business Entity, complete the box, then go to 2
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
FAIR MARKET VALUE IF APPLICABLE, LIST DATE:	FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
↓ \$0 - \$1,999 ↓ 12	\$0 - \$1,999 \$2,000 - \$10,000 - 12 - 12
☐ \$10,001 - \$100,000 ACQUIRED DISPOSED ☐ \$100,001 - \$1,000,000	\$10,001 - \$1,000,000 ACQUIRED DISPOSED
Over \$1,000,000	Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Partnership Sole Proprietorship	Partnership Sole Proprietorship
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
27 DENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME <u>TO</u> THE ENTITY/IRUST)	>2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITYTRUST)
□ \$0 - \$499 ☑ \$10,001 - \$100,000 □ \$500 - \$1,000 □ OVER \$100,000	□ \$0 - \$499 ☑ \$10.001 - \$100,000 □ \$500 - \$1,000 □ OVER \$100,000
\$1,001 + \$10,000	s1,001 - \$10,000
3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Automa separate there is necessary)	ST LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF ST00000 OR MORE Million & stoard street ("processing)"
None	None
	· · · · · · · · · · · · · · · · · · ·
A INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST	4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST CONTRACTOR OF THE PROPERTY OF TRUST
Check one box:	Check one box:
3609-045	1649-012
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property	Name of Business Entity, if Anvestment, or Assessor's Parcel Number or Street Address of Real Property
Rental Real Estate	Rental Real Estate
Description of Business Activity or City or Other Precise Location of Real Property	Description of Business Activity or City or Other Precise Location of Real Property
FAIR MARKET VALUE IF APPLICABLE, LIST DATE:	FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
□ \$2,000 - \$10,000 □ \$10,001 - \$100,000 12 12	\$2,000 - \$10,000 \$10,001 - \$100,000
S100,001 - \$1,000,000 ACQUIRED DISPOSED	S100,001 - \$1,000,000 ACQUIRED DISPOSED
Over \$1,000,000	Over \$1,000,000
NATURE OF INTEREST	NATURE OF INTEREST
Leasehold Other	Leasehold Other
Check box if additional schedules reporting investments or real property are attached	Check box if additional schedules reporting investments or real property are attached
Comments:	FPPC Form 700 (2012/2013) Sch. A-2
ounnondi	FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

AAN

SCHEDULE Investments, Income	
of Business Entil (Ownership Interest is 10	ies/Trusts
1 BUSINESS ENTITY OR TRUST	► 1. BUSINESS ENTITY OR TRUST
John M Lee and Lily T Lee Revocable Trust	John M Lee and Lily T Lee Revocable Trust
Name 1 Letterman Drive, #C500, San Francisco, CA 94129	Name 1 Letterman Drive, #C500, San Francisco, CA 94129
Address (Business Address Acceptable) Check one	Address (Business Address Acceptable)
I Trust, go to 2 I Business Entity, complete the box, then go to 2	Check one Image: Check one Image: Check one Image: Check
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
FAIR MARKET VALUE IF APPLICABLE. LIST DATE: \$0 - \$1,999	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$0 - \$1,999
NATURE OF INVESTMENT Partnership Sole Proprietorship Other Other	NATURE OF INVESTMENT
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
>2; Identify: The gross income received (include your pro rata share of the gross income <u>to</u> the entity/trust)	➤ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME <u>10</u> THE ENTITY/TRUST).
□ \$0 - \$499	□ \$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 SID/000 OR MORE (Altech & separate site Time sets by) None	St LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF NCOME OF \$10,000 OR MORE (Mish as photo first the sense) ♪ None
Alyson Belcher, Mary Jane Eisenberg, Sarah Haselup, Sarah Davis, Esmeralda Munoz	
4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST Check one box:	 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST Check one box:
INVESTMENT REAL PROPERTY	INVESTMENT REAL PROPERTY
Name of Bušiness Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property	Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property
Rental Real Estate Description of Business Activity or	Rental Real Estate Description of Business Activity pr
City or Other Precise Location of Real Property	City or Other Precise Location of Real Property
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 12 \$10,001 - \$100,000 12 \$100,001 - \$1,000,000 ACQUIRED Over \$1,000,000 ACQUIRED	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 \$10,000 12 \$10,001 - \$100,000 12 \$100,001 - \$1,000,000 ACQUIRED Over \$1,000,000 Over \$1,000,000
NATURE OF INTEREST	NATURE OF INTEREST
Leasehold Yrs. remaining	Leasehold Other
Check box if additional schedules reporting investments or real property are attached	Check box if additional schedules reporting investments or real property are attached
Comments:	FPPC Form 700 (2012/2013) Sch. A-2 FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

413

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

CALIFORNIA FORM

Name John M. I

IV1.	Lee	
		-

► 1. BUSINESS ENTITY OR TRUST	► 1. BUSINESS ENTITY OR TRUST
John M Lee and Lily T Lee Revocable Trust	
Name	Name
1 Letterman Drive, #C500, San Francisco, CA 94129	• •
Address (Business Address Acceptable)	Address (Business Address Acceptable)
Check one Image: Check one Image: Check one Image: Check	Check one
GENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$0 - \$1,999	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$0 - \$1,999
NATURE OF INVESTMENT	NATURE OF INVESTMENT
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)	> 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME <u>TO</u> THE ENTITYTRUST)
□ \$0 - \$499 □ \$10,001 - \$100,000 □ \$500 - \$1,000 ☑ OVER \$100,000 □ \$1,001 - \$10,000	\$0 - \$499 \$10,001 - \$100,000 \$5500 - \$1,000 OVER \$100,000 \$1,001 - \$10,000
33 LIST THE WAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (ditach a soparate blief) (freeseary) Done	SETTHE NAME OF EACH REPORTABLE SINGLE SOURCE OF STORE OF STORE OF MORE WIGHT SPEAK STOLENESS OF
Allce Sun, Alvin Chen, Tobi Stuart, John DeFazio, Brett Pameles, Peter Lowell, Matthew Schlachtman	
A INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST Check one box:	A INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST Check one box:
O218-11	
Name of Business Entity, if Investment, <u>or</u> Assessor's Parcel Number or Street Address of Real Property Rental Real Estate	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	Description of Business Activity or City or Other Precise Location of Real Property
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 12 \$10,001 - \$100,000 12 \$100,001 - \$1,000,000 ACQUIRED DISPOSED	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 //12 \$10,001 - \$100,000 //12 \$100,001 - \$1,000,000 ACQUIRED Over \$1,000,000 Over \$1,000,000
NATURE OF INTEREST	NATURE OF INTEREST
Leasehold Other	Leasehold <u>Yrs. remaining</u> Other
Check box if additional schedules reporting investments or real property are attached	Check box if additional schedules reporting investments or real property are attached
Comments:	FPPC Form 700 (2012/2013) Sch. A-2 FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

SCHEDULE B Interests in Real Property (Including Rental Income)



ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 1412-019	 ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 2041-012
	CITY
San Francisco	San Francisco
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 IF APPLICABLE, LIST DATE: \$10,001 - \$100,000 //12 \$100,001 - \$1,000,000 ACQUIRED Over \$1,000,000 Over \$1,000,000
- · · ·	
NATURE OF INTEREST Ownership/Deed of Trust Easement	NATURE OF INTEREST
Leasehold Duber	Leasehold Current Current Current
IF RENTAL PROPERTY, GROSS INCOME RECEIVED	IF RENTAL PROPERTY, GROSS INCOME RECEIVED
🗍 \$0 - \$499 📋 \$500 - \$1,000 🔲 \$1,001 - \$10,000	🗋 \$0 - \$499 📋 \$500 - \$1,000 🔲 \$1,001 - \$10,000
S10,001 - \$100,000	S10,001 - \$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.	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.
business on terms available to members of the public v	ending institutions made in the lender's regular course of without regard to your official status. Personal loans and
loans received not in a lender's regular course of busin	iess musi de disclosed as follows:
NAME OF LENDER*	NAME OF LENDER*
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
BUSINESS ACTIVITY, IF ANY, OF LENDER	BUSINESS ACTIVITY, IF ANY, OF LENDER
INTEREST RATE TERM (Months/Years)	INTEREST RATE TERM (Months/Years)
% None	% 🗋 None
HIGHEST BALANCE DURING REPORTING PERIOD	HIGHEST BALANCE DURING REPORTING PERIOD
\$500 · \$1,000 \$1,001 - \$10,000	☐ \$500 - \$1,000
S10,001 - \$100,000 OVER \$100,000	S10,001 - \$100,000 OVER \$100,000
Guarantor, if applicable	Guarantor, il applicable
· · · · · · · · · · · · · · · · · · ·	

Comments: __

FPPC Form 700 (2012/2013) Sch. B FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

Other than Gifts and		
	► 1. INCOME RECEIVED	
NAME OF SOURCE OF INCOME	NAME OF SOURCE OF INCOME	
Pacific Union International	Dignity Health	
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)	
1 Letterman Dr, #C500, San Francisco, CA 94129	900 Hyde St, San Francisco, CA 94109	
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Real Estate	Hospital	
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION	
Broker	Pharmacist	
GROSS INCOME RECEIVED 5500 - \$1,000 \$1,001 - \$10,000 \$10,001 - \$100,000 \$200 OVER \$100,000	GROSS INCOME RECEIVED \$500 - \$1,000 \$1,001 - \$10,000 \$10,001 - \$100,000 OVER \$100,000	
CONSIDERATION FOR WHICH INCOME WAS RECEIVED	CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
Loan repayment Partnership	Loan repayment Partnership	
Sale of (Real property, car, boet, etc.)	Sale of	
Commission or Rentel Income, list each source of \$10,000 or more	Commission or Rental locame, list each source of \$10 000 or more	
Diher (Describe)	Diher (Describe)	
 * You are not required to report loans from commercial le retail installment or credit card transaction, made in the 	nding institutions, or any indebtedness created as part of a	
members of the public without regard to your official sta	atus. Personal loans and loans received not in a lender's	
	atus. Personal loans and loans received not in a lender's	
members of the public without regard to your official sta regular course of business must be disclosed as follows NAME OF LENDER*	atus. Personal loans and loans received not in a lender's s:	
members of the public without regard to your official sta regular course of business must be disclosed as follows	atus. Personal loans and loans received not in a lender's s: INTEREST RATE TERM (Months/Years) % [] None	
members of the public without regard to your official sta regular course of business must be disclosed as follows NAME OF LENDER*	atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years) % None SECURITY FOR LOAN	
members of the public without regard to your official sta regular course of business must be disclosed as follows NAME OF LENDER*	atus. Personal loans and loans received not in a lender's s: INTEREST RATE TERM (Months/Years) % [] None	
members of the public without regard to your official sta regular course of business must be disclosed as follows NAME OF LENDER* ADDRESS (Business Address Acceptable)	atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years)% None SECURITY FOR LOAN None Personal residence Real Property	
members of the public without regard to your official sta regular course of business must be disclosed as follows NAME OF LENDER* ADDRESS (Business Address Acceptable)	atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years) % None SECURITY FOR LOAN None Personal residence	
members of the public without regard to your official sta regular course of business must be disclosed as follows NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER	atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years) % None SECURITY FOR LOAN None Personal residence Real Property Street address	
members of the public without regard to your official star regular course of business must be disclosed as follows NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER HIGHEST BALANCE DURING REPORTING PERIOD	Atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years)% None SECURITY FOR LOAN None Real Property Street address Gity	
members of the public without regard to your official staregular course of business must be disclosed as follows NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER HIGHEST BALANCE DURING REPORTING PERIOD S500 - \$1,000 \$1,001 - \$10,000	atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years) % None SECURITY FOR LOAN None Personal residence Real Property Street address	
members of the public without regard to your official star regular course of business must be disclosed as follows NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER HIGHEST BALANCE DURING REPORTING PERIOD \$500 - \$1,000 \$10,001 - \$100,000	Atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years)% None SECURITY FOR LOAN None Personal residence Real Property Guarantor City Guarantor	
members of the public without regard to your official staregular course of business must be disclosed as follows NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER HIGHEST BALANCE DURING REPORTING PERIOD S500 - \$1,000 \$1,001 - \$10,000	Atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years)% None SECURITY FOR LOAN None Real Property Street address Gity	
members of the public without regard to your official star regular course of business must be disclosed as follows NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER HIGHEST BALANCE DURING REPORTING PERIOD \$500 - \$1,000 \$10,001 - \$100,000	Atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years)% None SECURITY FOR LOAN SECURITY FOR LOAN Real Property Street address City Guarantor Other	
members of the public without regard to your official star regular course of business must be disclosed as follows NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER HIGHEST BALANCE DURING REPORTING PERIOD \$500 - \$1,000 \$10,001 - \$100,000	Atus. Personal loans and loans received not in a lender's S: INTEREST RATE TERM (Months/Years)% None SECURITY FOR LOAN None Real Property Street address City Other	

SCHEDULE E Income – Gifts Travel Payments, Advances, and Reimbursements

CALIFORNIA FORM 700
Name
John M. Lee

- You must mark either the gift or income box.
- Mark the "501(c)(3)" box for a travel payment received from a nonprofit 501(c)(3) organization or the "Speech" box if you made a speech or participated in a panel. These payments are not subject to the \$440 gift limit, but may result in a disqualifying conflict of interest.

NAME OF SOURCE (Not an Acronym)	► NAME OF SOURCE (Not an Acronym)
San Francisco Association of REALTORS (SFAR)	
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
301 Grove Street	
CITY AND STATE	CITY AND STATE
San Francisco, CA 94102	
BUSINESS ACTIVITY, IF ANY, OF SOURCE 501 (c)(3)	BUSINESS ACTIVITY, IF ANY, OF SOURCE 501 (c)(3)
Real Estate Association	
DATE(S): 09,01,12 08,31,13 AMT: \$5,233.03	DATE(S):
TYPE OF PAYMENT: (must check one) 🗌 Gift 🛛 🖉 Income	TYPE OF PAYMENT: (must check one)
Made a Speech/Participated in a Panel	Made a Speech/Participated in a Panel
Other - Provide Description	Other · Provide Description
Reimbursement for travel expenses to various	
conferences on behalf of SFAR	
NAME OF SOURCE (Not an Acronym)	► NAME OF SOURCE (Not an Acronym)
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
CITY AND STATE	CITY AND STATE
BUSINESS ACTIVITY, IF ANY, OF SOURCE 501 (c)(3)	BUSINESS ACTIVITY, IF ANY, OF SOURCE 501 (c)(3
DATE(S):// AMT: \$	DATE(S): / AMT: \$
TYPE OF PAYMENT: (must check one) 🗌 Gift 📋 Income	TYPE OF PAYMENT: (must check one) Gift Income
Made a Speech/Participated in a Panel	Made a Speech/Participated in a Panel
Other - Provide Description	Other - Provide Description
Comments:	
	FPPC Form 700 (2012/2013) Sch.
	FPPC Advice Email: advice@fppc.ca.g FPPC Toil-Free Helpline: 866/275-3772 www.fppc.ca.g

STATE OF CALIFORNIA BUREAU OF REAL ESTATE

The license information shown below represents public information taken from the Bureau of Real Estate's database at the time of your inquiry. It will not reflect pending changes which are being reviewed for subsequent database updating. Also, the license information provided includes formal administrative actions that have been taken against licensees pursuant to the Business and Professions Code and/or the Administrative Procedure Act. All of the information displayed is public information. Although the business and mailing addresses of real estate licensees are included, this information is not intended for mass mailing purposes.

License information taken from records of the Bureau of Real Estate on 8/14/2013 9:46:55 AM

License Type:	BROKER
Name:	Lee, John M
Mailing Address: -	LAPLAYA STE 537 SAN FRANCISCO, CA 94121
License ID:	00965312
Expiration Date:	09/28/16
License Status:	LICENSED
Salesperson License Issued:	07/20/87 (Unofficial taken from secondary records)
Broker License Issued:	09/29/88 (Unofficial taken from secondary records)
Former Name(s):	NO FORMER NAMES
Main Office:	1 LETTERMAN DRIVE BUILDING C SUITE 300 SAN FRANCISCO, CA 94129
DBA	NO CURRENT DBAS
Branches:	NO CURRENT BRANCHES
Affiliated Licensed Corporation(s)	NO CURRENT AFFILIATED CORPORATIONS
Salespersons:	<u>01008573</u> - Lee, Lily Tam
<u>Comment</u> :	NO DISCIPLINARY ACTION
	NO OTHER PUBLIC COMMENTS
	>>>> Public information request complete <<<<

Wong, Linda (BOS)

From:Lee, John [johnlee@pacunion.com]Sent:Sunday, October 27, 2013 5:44 PMTo:Wong, Linda (BOS)Cc:Duran, DawnSubject:RE: Board of Supervisors' Rules Committee Meeting - Assessment Appeals Board Nos. 1-3Attachments:AAB Letter.102713.pdf

Hi Linda,

Thank you for the email. Unfortunately I will be out of town this week and won't be able to attend the Rules Committee meeting on Thursday.

Please submit the attached letter on my behalf and I will reach out to Supervisors Yee, Breed, and Cohen prior to the meeting.

Thanks!

John M. Lee, MBA | Real Estate Broker PACIFIC UNION INTERNATIONAL - CHRISTIE'S GREAT ESTATES One Letterman Drive, Bldg C, Suite 300, San Francisco, CA 94129 d. 415.447.6231 | f. 415.447.6201 | johnlee@pacunion.com | BRE# 00965312 A Member Of Real Living

From: Wong, Linda (BOS) [mailto:linda.wong@sfgov.org] Sent: Friday, October 25, 2013 4:05 PM

To: ytahbazof@gmail.com; merv.conlan@sbcglobal.net; fredperezcpa@yahoo.com; megruxton@comcast.net; sridgell@aol.com; kristy@mleffers.com; Lee, John; angelamcheung@hotmail.com; rchang@manatt.com; evalla@lurie.com; jjmassociates@sbcglobal.net

Cc: Duran, Dawn

Subject: Board of Supervisors' Rules Committee Meeting - Assessment Appeals Board Nos. 1-3

Please be advised that the next Rules Committee meeting is scheduled for Thursday, October 31, 3013, at 1:30 p.m. in City Hall, Room 263.

The Committee Members will meet to consider your appointment to the Assessment Appeals Board Nos. 1-3.

There are no set instructions on what you are expected to tell the Rules Committee. However, a brief description of your qualifications, reasons for interest in the subject, or a short discussion of why you feel you would make a good candidate is appropriate.

Please respond before Tuesday, October 29, 2013, whether or not you will be able to attend this meeting.

Sincerely,

ida Wong Board of Supervisors

1

City Hall 1 Dr. Carlton B. Goodlett Place, Room 244 San Francisco, CA 94102 Telephone No. 415-554-7719 Fax No. 415-554-7714

Complete a Board of Supervisors Customer Satisfaction form by clicking:<u>http://www.sfbos.org/index.aspx?page=104</u>.



October 27, 2013

Supervisor Norman Yee Supervisor London Breed Supervisor Malia Cohen SF Board of Supervisors - Rules Committee

RE: Assessment Appeals Board Appointment

Dear Supervisors Yee, Breed, and Cohen:

I was notified on Friday, October 25th, that my appointment to the Assessment Appeals Board (AAB) has been calendared for October 31, 2013. Unfortunately I will be out of town this week and unable to reschedule my trip. I am hoping the following regarding my qualifications will suffice in lieu of an appearance before the Rules Committee.

I have been a real estate broker for the past 25 years helping our San Francisco residents buy and sell properties. I mainly work with sellers and my principal function is helping them with pricing; thus I believe that my experience will help tremendously with the Assessment Appeals Board position. In addition to my work experience, I have been serving our community by writing monthly real estate articles published in the Richmond ReView and Sunset Beacon; leading different real estate related organizations; and participating in various community events throughout the City. I have spoken to several current AAB commissioners and understand what this position requires. In fact, all of them are supportive of my application to the AAB.

My hope is that you will support my appointment to the AAB and vote to recommend me to the full Board. If you have any questions, please do not hesitate to contact me.

Sincerely,

Jh. M. Lu

John M. Lee Broker (415) 465-0505 johnlee@pacunion.com

ONE LETTERMAN DRIVE, BUILDING C, SUITE 300, SAN FRANCISCO, CA 94129

A Member Of Real Living



Board of Supervisors City and County of San Francisco 1 Dr. Carlton B. Goodlett Place, Room 244 (415) 554-5184 FAX (415) 554-7714

Application for Boards, Commissions, Committees, & Task Forces

Name of Board, Commission, Committee, or Task Force: _______Assessment Appeals Board

Seat # or Category (If applicable): Drand 5 1-3 (all seats) Distri	ict:
Name:Yosef Tahbazof	
Home Address: Burnett Ave, San Francisco	Zip:
Home Phone: Occupation:Attorney	
Work Phone: Employer: Tahbazof Law Firm	
Business Address:	Zip:

Business E-Mail: yosef@tahbazoflaw.com Home E-Mail: _______@gmail.com

Pursuant to Charter Section 4.101 (a)2, Boards and Commissions established by the Charter must consist of electors (registered voters) of the City and County of San Francisco. For certain other bodies, the Board of Supervisors can waive the residency requirement.

Check All That Apply:

Registered voter in San Francisco:	Yes 🖃 No 🗌	If No, where registered:	
------------------------------------	------------	--------------------------	--

Resident of San Francisco 🗇 Yes 💭 No If No, place of residence:

Pursuant to Charter section 4.101 (a)1, please state how your qualifications represent the communities of interest, neighborhoods, and the diversity in ethnicity, race, age, sex, sexual orientation, gender identity, types of disabilities, and any other relevant demographic qualities of the City and County of San Francisco:

I was born in San Francisco shortly after my family immigrated from Iran. I have always enjoyed and cared for the city which was one of the main reasons I pursued my legal education at UC Hastings. In my professional capacity, I have had the pleasure of working with a broad spectrum of community members and have often collaborated closely with neighborhood groups as well as community organizations.

Business and/or professional experience:

I have worked in the following capacities: attorney, property manager,

tax accountant, and paralegal.

Civic Activities:

I volunteered for Mayor Gavin Newsom and Supervisor Michela Alioto-Pier. I have also enjoyed volunteering at the Shelter Network and Home Away from Homelessness.

Have you attended any meetings of the Board/Commission to which you wish appointment?

Yes No

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (Applications must be received 10 days before the scheduled hearing.)

Date: 10.25.2013 Applicant's Signature: (required)

<u>Please Note</u>: Your application will be retained for one year. Once Completed, this form, including all attachments, become public record.

FOR OFFICE USE ONLY: Appointed to Seat #:_____ Term Expires:____

Date Seat was Vacated: ____

01/20/12

YOSEF TAHBAZOF

TAHBAZOF LAW FIRM, LLP

1256 Howard Street • San Francisco, CA 94103 • (415) 922-0200 x 111 • yosef@tahbazoflaw.com

September 9, 2013

Supervisor Norman Yee Rules Committee Chair Board of Supervisors City Hall 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102

Dear Supervisor Yee:

Please consider the enclosed resume as an application to serve our City in whatever capacity you deem necessary and fitting. Should you have any questions or desire to meet with me, I will make myself available at your convenience.

Sincerely, Yosef Tahbazof

YOSEF TAHBAZOF

EDUCATION

University of California, Hastings College of the Law, San Francisco, CA Juris Doctor, 2011

Santa Clara University, Santa Clara, CA Bachelor of Science in Commerce, 2008

EXPERIENCE

Tahbazof Law Firm, San Francisco, CA Partner

August 2011 - Present

August 2011 - Present

- Drafted contracts including real property purchase agreements, LLC operating agreements, stipulations, settlement agreements, prime contracts, subcontractor agreements, lease agreements, employment contracts.
- Negotiated informal settlements resulting in fair compromises and avoidance of cumbersome litigation.
- Represented clients in disputes and cases concerning mechanics' liens, construction defects, unlawful detainers, breach of contractual obligations.

SST Investments, San Francisco, CA Manager

- Management of hundreds of rental units including mediation of conflicts with tenants and neighbors; implementation of innovative work order tracking system; ensuring prompt repairs; coordinating with independent contractors; acquiring and maintaining proper documentation; resolving tenant complaints; ensuring legal compliance of operations.
- Created project-specific construction accounting programs.
- Secured over \$10 million in financing for construction projects.
- Successfully led refinancing efforts for dozens of apartment buildings.
- Construction management including negotiating supply and service contracts; overseeing quality of work; utility applications; accounting for expenses.

Ross Madden Law, San Francisco, CA May 2010 - August 2010 Intern

- Drafted various forms of pleadings and motions.
- Data acquisition and forensic analysis used to uncover latent causes of action.
- Assisted in informal negotiations and discussions with opposing parties.

Price Waterhouse Coopers, San Francisco, CA May 2007 - September 2007 Transfer Pricing and Corporate Accounting Intern

- Implemented corporate guidelines and Generally Accepted Accounting Principles (GAAP) to prepare unified documents for the financial reporting of publicly traded corporations.
- Translated financial information into user-friendly formats for clientele.
- Researched Transfer Pricing Division guarantee agreements, capital infusion agreements and capital support agreements.
- Proactively participated in weekly staff meetings and coordinated large documents with and between associates for joint clients.

Effective Solutions, San Mateo, CA Assistant Property Manager

June 2006 – September 2006

- Responded to and satisfied tenant requests for property repairs.
- Mediated conflicts between landlords, tenants and neighbors.
- Managed and coordinated schedules of multiple contractors and merchants to maximize productivity.
- Assignments consisted of the removal and subsequent reinstallation of hardwood,
- sheetrock, and insulation as well as applying exterior and interior paint.

ACTIVITIES

Campaign Volunteer: San Francisco Supervisor Michela Alioto-Pier (2004) & San Francisco Mayor Gavin Newsom (2003)

Volunteer: Shelter Network, Home Away from Homelessness

Other: Setar (Persian classical instrument), Accounting Tutor, Law School Tutor

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION A PUBLIC DOCUMENT

STATEMENT OF ECONOMIC INTERESTS

Date Received

COVER PAGE

AME OF FILER	(LAST)		(FIRST)	(MIDDLE)
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Office, Agency, or	Court			
Agency Name				
Assessment Appe	als Board			•
Division, Board, Departm	nent, District, if applicable		Your Position	, , , , , , , , , , , , , , , , , , ,
			•	
 If filing for multiple po 	ositions, list below or on an attach	ment.		
Agency:		<u>,</u>	Position:	
. Jurisdiction of O	ffice (Check at least one box)			
State		[Judge or Court Commission	er (Statewide Jurisdiction)
Multi-County		F	Z County of San Francisc	0
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-or- The period	l covered is/	, through		anuary 1, 2012, through the date of
December	J1, 2012.			
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Assuming Office:			 The period covered is _ the date of leaving offic 	e.
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SCHEDULE A-2 Investments, Income, and Assets of Business Entities/Trusts (Ownership Interest is 10% or Greater)



1. BUSINESS ENTITY OR TRUST	► 1. BUSINESS ENTITY OR TRUST
SYTS Investments, LLC	Tahbazof Law Firm, LLP
Name 1256 Howard Street, San Francisco, CA 94103	Name 1256 Howard Street, San Francisco, CA 94103
ddress (Business Address Acceptable)	Address (Business Address Acceptable)
heck one	Check one
Trust, go to 2 I Business Entity, complete the box, then go to 2	Trust, go to 2 🗹 Business Entity, complete the box, then go to 2
ENERAL DESCRIPTION OF BUSINESS ACTIVITY	GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Real property rental	Legal services
AIR MARKET VALUE IF APPLICABLE, LIST DATE:	FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
\$2 000 - \$1,999 \$2 000 - \$10 000 // 12/ / 12	\$0 - \$1,999 □ \$2 000 - \$10 000 / / 12 / / 12
\$2,000 - \$10,000 IZ IZ \$10,001 - \$100,000 ACQUIRED DISPOSED	\$2,000 \$10,000
\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Z Over \$1,000,000	Over \$1,000,000
ATURE OF INVESTMENT	
Partnership Sole Proprietorship Z	Partnership Sole Proprietorship
	YOUR BUSINESS POSITION Partner
	╝╏╏┞╌╌┵╼╍╾╴╴╌╴╴╴╴╴╴╴╴╴╴╴╴╴╴╴╴╴╴╴╴╴
2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RAT, SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)	A > 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RAT SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)
\$10,001 - \$100,000	\$0 - \$499 \$10,001 - \$100,000
_ \$500 - \$1,000	☐ \$500 - \$1,000 ✔ OVER \$100,000
3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF	S. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF
INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary)	INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary)
] None	None
Properties listed in Item 4.	Legal services rendered.
4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST	► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED <u>BY</u> THE BUSINESS ENTITY OR TRUST
Check ane box:	Check one box:
See attachment.	
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property	Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property
Description of Business Activity <u>or</u> City or Other Precise Location of Real Property	Description of Business Activity or City or Other Precise Location of Real Property
FAIR MARKET VALUE IF APPLICABLE, LIST DATE:	FAIR MARKET VALUE IF APPLICABLE, LIST DATE;
\$2,000 - \$10,000	\$2,000 - \$10,000
\$10,001 - \$100,000 12 12 \$100,001 - \$1,000,000 ACQUIRED DISPOSED	10 \$10,001 - \$100,000 / 12 / 12
_] \$100,001 - \$1,000,000 ACQUIRED DISPOSED	ACQUIRED DISPOSED
JATURE OF INTEREST	NATURE OF INTEREST
Property Ownership/Deed of Trust	Property Ownership/Deed of Trust Stock Partnership
Cleasehold	Cher
Yrs. remaining	Yrs. remaining
Check box if additional schedules reporting investments or real property are attached	Check box if additional schedules reporting investments or real property are attached
Comments:	FPPC Form 700 (2012/2013).SchA FPPC Advice Email: advice@fppc.ca.go

SCHEDULE B Interests in Real Property (Including Rental Income)



Yosef Tahbazof

Name

 ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 537-541 Natoma 	 ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 1402 Sanchez
CITY	CITY
San Francisco FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 01 / 11 / 12 / / 12 \$10,001 - \$100,000 01 / 01 / 01 / 12 \$10,001 - \$1,000,000 01 / 01 / 01 / 01 / 01 VOver \$1,000,000 01 / 01 / 01 / 01	San Francisco FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 03 / 08 / 12 / / 12 \$10,001 - \$1,000,000 ACQUIRED \$10,001 - \$1,000,000 DISPOSED
NATURE OF INTEREST	NATURE OF INTEREST
Yrs. remaining Other IF RENTAL PROPERTY. GROSS INCOME RECEIVED	Yrs. remaining Other IF RENTAL PROPERTY, GROSS INCOME RECEIVED ✓ \$0 - \$499 ✓ \$0 - \$499
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 None	 ☐ \$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 commercial lo	ending institutions 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*	NAME OF LENDER*	
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)	
BUSINESS ACTIVITY, IF ANY, OF LENDER	BUSINESS ACTIVITY, IF ANY, OF LENDER	
INTEREST RATE TERM (Months/Years)	INTEREST RATE TERM (Months/Years)	
% [] None	% None%	
HIGHEST BALANCE DURING REPORTING PERIOD	HIGHEST BALANCE DURING REPORTING PERIOD	
\$500 - \$1,000 \$1,001 - \$10,000	\$1,001 - \$10,000	
S10,001 - \$100,000 OVER \$100,000	S10,001 - \$100,000 OVER \$100,000	
Guarantor, if applicable	Guarantor, if applicable	
omments:		

FPPC Form 700 (2012/2013) Sch. B FPPC Advice Email: advice@fppc.ca.gov FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

ATTACHMENT TO SCHEDULE A-2

SYTS INVESTMENTS, LLC

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

1 595-599 Naples Avenue, San Francisco		
·	Fair market value	\$100,001-\$1,000,000
	Nature of interest	Property ownership
2 635 Burnett Avenue, San Francisco		
	Fair market value	Over \$1,000,000
	Nature of interest	Property ownership
3	2500-2510 Folsom Street, San Francisco	

Fair market value Over \$1,000,000 Nature of interest Property ownership

4	941 Cayuga Avenue, San Francisco		
	Fair market value	\$100,001-\$1,000,000	
	Nature of interest	Property ownership	

5 915 Cayuga Avenue, San Francisco

Fair market value	Over \$1,000,000
Nature of interest	Property ownership

San Francisco BOARD OF SUPERVISORS

Date Printed: October 25, 2013

Date Established:

December 24, 1998

Active

ASSESSMENT APPEALS BOARD NO. 1

Contact and Address:

Dawn Duran Assessment Appeals Board City Hall, Room 405 San Framcsco, CA 94102

Phone: (415) 554-6778 Fax: (415) 554-6775 Email: Dawn.Duran@sfgov.org

Authority:

Administrative Code Chapter 2B et speq.; amended by Ordinance No. 393-98, Approved 12/24/1998; amended by Ordinance No. 273-99, Approved 10/27/99.

Board Qualifications:

The Assessment Appeals Board No. 1 consists of eight members, five regular members, and three alternate members all appointed by the Board of Supervisors. The regular members of Assessment Appeals Board No. 1 shall serve ex officio as the regular members of Assessment Appeals Board No. 3 concurrent with their service on Assessment Appeals Board No. 1.

No person may concurrently hold a seat on Assessment Appeals Board No. 1 and a seat on Assessment Appeals Board No. 2.

The Board members' term of office is three years, beginning on the first Monday in September. In the event of a vacancy, the newly appointed member shall serve for the remainder of the unexpired term.

The Board shall have the following qualifications as stated in the eligibility critiera set forth in Section 1624.05 of the California Revenue and Taxation Code as follows: Must have a minimum of five years professional experience in the State of California as one of the following: Certified Public Accountant (CPA) or Public Accountant (PA); licensed Real Estate Broker; Attorney; or a Property Appraiser accredited by a nationally recognized professional organization, or Property Appraiser certified by the Office of Real Estate Appraisers; or he or she is a current member of an assessment appeals board.

"R Board Description" (Screen Print)

San Francisco BOARD OF SUPERVISORS

Hearing Officers: The regular and alternate members of the Board shall also serve as hearing officers. The Clerk shall designate members to act as hearing officers for particular applications using a rotating system designed to assure that all members with the same priority level, as described in this subsection, have an equal opportunity over time to participate as hearing officers. The Clerk shall designate hearing officers in the following priority order: (a) the alternate members of Assessment Appeals Board No. 2: (b) the alternate members of Assessment Appeals Board No. 2: (b) the alternate members of Assessment Appeals Board No. 1. In their capacity as assessment hearing officers, the officers shall serve at the pleasure of and by contract with the Board of Supervisors.

It shall be the duty of each Assessment Appeals Board to equalize the valuation of the taxable property within the City and County for the purposes of taxation in the manner and subject to the limitations contained in Article XIII of the California State Constitution and Assessment Appeals Board 1 shall have jurisdiction to hear applications for reduction affecting any property on the secured or unsecured rolls without limitation.

Report: Pursuant to Section 1639 of the Revenue and Taxation Code, the hearing officer shall prepare a summary report of the proceedings together with a recommendation on the application and shall transmit this report and recommendation to the Clerk of the Board of Supervisors.

Compensation: \$100 for each one-half day of service. Sunset Clause: None

"R Board Description" (Screen Print)