



CITY AND COUNTY OF SAN FRANCISCO  
**DEPARTMENT OF ELECTIONS**

John Arntz, Director

**Official Filing Forms – Board of Supervisors only**

Please read the following carefully:

- You must file your declaration of candidacy on the same day as you file your declaration to accept or solicit campaign contributions. SF MEC § 201
- If you are a member of a City board, commission, or other body established by the San Francisco Charter, filing your declaration of candidacy may, with certain exceptions, result in forfeiture of your seat. S.F. Charter § 4.101.1

2025 NOV 14 AM 11:37

Issued by: ms

Date: 11/14/25

**Declaration of Intention to Solicit or Accept Contributions For Local Office**

(CGCC § 1.122(a); SF MEC § 201)

I, David Edward Lee, hereby declare my intention to become a candidate for the office of  
Print name of candidate  
D4 Supervisor of San Francisco at the forthcoming election to be held on 6/2/26  
Month, day, year

[Redacted Signature]  
Candidate's signature

11/14/25  
Date

**Declaration of Candidacy**

(CGCC § 1.122(a); CAEC §§ 13, 200, 8020, 8028(a), 8040, 8064; SF MEC § 201, 210)

I hereby declare myself a candidate for election to the office of D4 Supervisor to be voted for at the Statewide Direct Primary Election to be held on June 2nd, 2026, and I declare the following to be true: my legal name, as given at birth or as established by marriage, common usage, or habit in all my affairs, or by decree of any court of competent jurisdiction is:

David E. Lee  
Print first name M. I. Print last name

Address: [Redacted] San Francisco CA 94116  
Number and street City, State ZIP Code

Mailing: same same  
Number and street City, State ZIP Code

Telephone Number: [Redacted] x: [Redacted]; Email: [Redacted]

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

Executed on 11/14/25 2025, in San Francisco CA  
Date

English (415) 554-4375  
Fax (415) 554-7344  
TTY (415) 554-4386

sfelections.org  
1 Dr. Carlton B. Goodlett Place  
City Hall, Room 48, San Francisco, CA 94102

中文 (415) 554-4367  
Español (415) 554-4366  
Filipino (415) 554-4310



CITY AND COUNTY OF SAN FRANCISCO  
**DEPARTMENT OF ELECTIONS**

John Arntz, Director

**Sworn Statement**

- I meet the statutory and/or constitutional requirements for this office including, but not limited to, citizenship and residency.
- I understand that I may withdraw no later than 126 days before the election.
- If elected, I will qualify and accept the office of which I am a candidate and serve to the best of my ability.
- I am at present the incumbent of the following public office (if any): \_\_\_\_\_

\_\_\_\_\_  
Candidate Signature

11/14/25 Date 2025.

**Oath of Office**

I, David Edward Lee, do solemnly swear (or affirm) that I will support and defend the Constitution of the United States and the Constitution of the State of California against all enemies, foreign and domestic; that I will bear true faith and allegiance to the Constitution of the United States; that I will take this obligation freely, without any mental reservation or purpose to evade the duties upon which I am about to enter.

\_\_\_\_\_  
Candidate Signature

State of California  
County of San Francisco ☐ SS.

Subscribed and sworn to before me on this 14 day of November, 2025.

\_\_\_\_\_  
Notary Public (or other official)

Examined and certified by Matthew Selby this 14<sup>th</sup> day of November, 2025  
Deputy

**For Department of Elections Use:**

Date of original registration: 10/10/95 Date of re-registration: 10/11/25

Fax (415) 554-7544  
TTY (415) 554-4386

City Hall, Room 48, San Francisco, CA 94102

Espanol (415) 554-4386  
Filipino (415) 554-4310



CITY AND COUNTY OF SAN FRANCISCO  
**DEPARTMENT OF ELECTIONS**

John Arntz, Director

For the Ballot

(CAEC §§ 13104, 13106- 13107, 13211.7; SF MEC §§ 205, 225, 401)

Official Filing Form

2025 JAN -5 AM 11:00  
DEPARTMENT OF ELECTIONS

County Elections Official

By: \_\_\_\_\_  
Date Issued: \_\_\_\_\_

Ballot  
Information  
Name and  
ballot  
designation to  
appear on the  
ballot

1

**IMPORTANT NOTE:** A ballot designation is optional. If one is requested, a completed **BALLOT DESIGNATION WORKSHEET** must be submitted. If no ballot designation is requested, write "NONE" and initial in the box. (Elections Code §§ 13107, 13107.3)

I request my name and ballot designation to appear on the ballot as follows:

David E. Lee

Print Your Name for Use on the Ballot

Candidate initials box if NO  
ballot designation is  
preferred.

Educator

Print Ballot Designation Requested



Name in  
Chinese  
Characters

2

The names of candidates appear on the official ballot in traditional Chinese characters as well as in English. The Department of Elections can provide this transliteration or translation for candidates for local office, or the candidate may provide documentation of established use of a name in Chinese.

If a candidate has a character-based name by birth, that can be verified by birth certificate or other valid identification, the candidate may use that name on the ballot instead of a phonetic transliteration. A candidate who does not have a character-based name by birth, but who identifies by a particular character-based name and can demonstrate that the they have been known and identified within the public sphere by that name over the past two years, may use that name instead of a phonetic transliteration.

**Check one option (provide supporting documentation):**

- ☐ I request that the Department of Elections, working with a qualified Chinese-language translator, provide a Chinese transliteration or translation of my name for all materials where it is legally required.
- ☒ I am providing documentation of established use of a particular Chinese transliteration or translation of my name for the Department to review. I understand that the Department's decision whether to accept a proposed transliteration or translation is final.
- ☐ I have a character-based name by birth and am providing supporting documentation of this name.

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## 州眾議員第19選區候選人

### 李志威 (DAVID E. LEE)

我的職業是教育工作者。

#### 我的資格是：

這次選舉是為我們的城市選擇一個不同的方向，還是選擇一成不變。

作為一名土生土長的三藩市人，我看到我們面臨的挑戰日益嚴重，因為政客的決策只有利於他們的競選贊助者，例如富有的房地產利益團體，而不是人民的需求。

這種情況必須停止，這也是我為何競選在眾議院代表您們，並在與您息息相關的問題上取得進展：

- 教育：我一直致力於教育事業，見證了良好的教育如何改變年輕人的人生。這就是為什麼加州的社區大學必須完全免學費，讓每個人都有機會免費追求任何職業途徑。
- 住房：三藩市有太多的居民被趕出他們熱愛的社區。我支持租金管制，並在重大住房決策上聽取更多社區的意見。我將會保護我們的社區，推動明智的增長，在社區的支持下建設可負擔住房，而不是像近年來的盲目發展，威脅三藩市豐富的多元性。
- 公共安全：雖然三藩市東區得到了絕大多數的關注，但我將爭取更多資源來應對影響西區居民和小企業的基本安全問題。

請加入州眾議員Phil Ting、三藩市市議會主席Aaron Peskin、前三藩市市議會主席Norman Yee和前三藩市市議員Sandra Lee Fewer等領導人的行列，投票支持李志威競選州眾議員。

<https://www.davidleeforassembly.com/>

李志威 (David E. Lee)

### 司嘉怡 (CATHERINE STEFANI)

我的職業是縣議員。

#### 我的資格是：

我競選州眾議員是為了替我們所有人爭取一個更安全以及更可負擔的加州。

這不是一個空頭的承諾——我有往績來支持。作為一位前檢察官、全國槍枝暴力預防倡導者、縣議員和母親，我一直堅定不移地致力爭取更安全的社區，以及所有加州人都能負擔的住房。作為市議員，我增加了警力、打擊了汽車盜竊，並且擴大了獲取戒毒服務的途徑。我成立了「媽媽要求行動」(Moms Demand Action) 三藩市分會，並且通過全面的槍枝安全法律，包括加州首個幽靈槍枝禁令。我核准為低收入家庭和老年人建造1,000套住宅，通過了全面的反貪腐和非營利監督立法，並與北加州計劃生育協會合作，開設了新的旗艦健康中心。

現在，我準備好在州議會打拼。在那裡，我將爭取我們所需的資源來解決毒品危機，並追究芬太尼販毒者的責任。我將努力增加獲得可負擔住房的機會，讓工薪家庭留在他們的社區，並爭取我們城市所需的資源，提前防止無家可歸的發生。在保護我們的生育權利和為所有人爭取醫療服務方面，我將永不退縮。

作為您們的州眾議員，我將貫徹始終為我們的價值觀而打拼。我很榮幸得到加州民主黨、加州勞工聯盟、北加州計劃生育協會行動基金、Sierra Club、榮譽議長Nancy Pelosi、國會議員Kevin Mullin、前國會議員Jackie Speier、州長Gavin Newsom、財政部長Fiona Ma、州參議員Scott Wiener，州眾議員Diane Papan，以及帝利市、南三藩市、Colma和三藩市社區領導人的支持。

瞭解更多，瀏覽VoteCatherineStefani.com

司嘉怡 (Catherine Stefani)

2025 JAN -5 AM 11:00  
SUN JAN -5 AM 11:00  
SUN JAN -5 AM 11:00



California Secretary of State  
BALLOT DESIGNATION WORKSHEET

June 2, 2026 Statewide Direct Primary Election (Elections Code §§ 13107, 13107.3, 13107.5; California Code of Regulations § 20711)

This entire form must be completed, or it will not be accepted, and you will not be entitled to a ballot designation. DO NOT LEAVE ANY RESPONSE SPACES BLANK. If information requested is not applicable, please write "N/A" in the space provided, otherwise the information MUST be provided. UPON FILING, THIS WORKSHEET WILL BE A PUBLIC DOCUMENT.

Candidate  
Information

1

Candidate Name: David E. Lee

Office: District 4 Supervisor

Email: [REDACTED]

Home Address: [REDACTED] San Francisco, CA 94116

Mailing Address: [REDACTED]

Business Address: [REDACTED] Lakeport, CA 95453

Phone Number(s)

Business:

Home/Mobile: [REDACTED]

Fax: [REDACTED]

Attorney or  
Other  
Authorized  
Person  
Information

2

Attorney Name (or other person authorized to act on your behalf): [REDACTED]

Address: [REDACTED]

Phone Number(s)

Business:

Mobile: [REDACTED]

Fax: [REDACTED]

You may select as your ballot designation one of the following designations:

- (a) Your current principal profession(s), vocation(s), or occupation(s) [maximum total of three words, separated by a slash ("/")].
- (b) The full title of the public office you currently occupy and to which you were elected.
- (c) "Appointed [full title of public office]" if you currently serve by appointment in an elective public office and are seeking election to the same office or to some other office.
- (d) "Incumbent" if you were elected (or, if you are a Superior Court Judge, you are a candidate for the same office that you hold) to your current public office and seek election to the same office.
- (e) "Appointed Incumbent" if you were appointed to your current elective public office and seek election to the same office.

Proposed Ballot  
Designation(s)

3

Proposed Ballot Designation(s): Educator

Alternate Ballot Designation(s) 1: Non profit Director

Alternate Ballot Designation(s) 2: [REDACTED]

If your proposed ballot designation is pursuant to Elections Code § 13107(a)(3):

The professions, vocations or occupations relied upon to support my proposed ballot designation(s) constitute my primary, main or leading professions, vocations or occupations. Initial PEL

Translation of Proposed Designation: Gender specific translations will default to the masculine form for uniformity in translation unless you specify otherwise: ( ☒ ) Masculine ( ☐ ) Feminine

In the spaces provided on the next page(s):

- (a) Describe why you believe you are entitled to use the proposed ballot designation.
- (b) If your proposed ballot designation contains one or more slashes ("/") separating words in your ballot designation for separate principal profession(s), vocation(s), or occupation(s) (collectively known as "PVOs"), complete a justification section for each separate PVO.
- (c) Attach any documents or exhibits that you believe support your proposed ballot designation. (Note: It is not necessary to provide copies of Certificates of Election if you are currently a seated member for a voter-nominated office).
- (d) If using the title of an elective office, attach a copy of your certificate of election or appointment.
- (e) Any supporting documents will not be returned to you. Do not submit originals.

It is your responsibility to justify your proposed ballot designation and to provide all requested details.



California Secretary of State  
BALLOT DESIGNATION WORKSHEET

June 2, 2026 Statewide Direct Primary Election (Elections Code §§ 13107, 13107.3, 13107.5; California Code of Regulations § 20711)

Page 2

If your proposed ballot designation includes the word "volunteer," indicate the title of your volunteer position and the name of the entity for which you volunteer along with a brief description of the type of volunteer work you do and the approximate amount of time involved. You may only use the ballot designation "community volunteer" if you volunteer for a 501(c)(3) charitable, educational, or religious organization, a governmental agency or an educational institution. You may not use "community volunteer" together with another designation.

If your proposed ballot designation contains one or more slashes ("/") separating multiple principal profession(s), vocation(s), or occupation(s) (collectively known as "PVOs"), complete a justification section for each separate PVO.

Justification for use of Proposed Ballot Designation(s)  
If you are proposing alternate ballot designations, please provide justification for use of those on Page 3.

4

Justification for use of 1<sup>st</sup> PVO:

I was director of the Asian Pacific American Student Success program at Laney College

Current or most recent job title: Director/Educator Start Date: 2017 End Date: 2025

Employer Name or Business: Laney College

Person who can verify this information:

Name: Gary Albury

Phone Number(s):

Email:

Justification for use of 2<sup>nd</sup> PVO:

I have a doctorate in Education and I was/am a part-time lecturer of political science at San Francisco State University.

Current or most recent job title: Part-time Lecturer Start Date: 2003 End Date: current

Employer Name or Business: San Francisco State University

Person who can verify this information:

Name: James Martel

Phone Number(s):

Email:

Justification for use of 3<sup>rd</sup> PVO:

Current or most recent job title: Start Date: End Date:

Employer Name or Business:

Person who can verify this information:

Name:

Phone Number(s):

Email:

Before signing below, answer/initial the following questions. Does your proposed ballot designation:

- 1) Use only a portion of the title of your current elected office?
- 2) Non-judicial candidates: Use only the word "Incumbent" for an elective office to which you were appointed?
- 3) Use more than three total words for your principal professions, vocations, or occupations?
- 4) Suggest an evaluation of you, such as outstanding, leading, expert, virtuous, or eminent?
- 5) Refer to a status (Veteran, Activist, Founder, Scholar), rather than a profession, vocation, or occupations?
- 6) Abbreviate the word "retired"?
- 7) Place the word "retired" after the words it modifies? Example: Accountant, retired
- 8) Use a word or prefix (except "retired") such as "former" or "ex-" to refer to a former profession, vocation, or occupation?
- 9) Use the word "retired" along with a current profession, vocation, or occupation? Example: Retired Firefighter/Teacher
- 10) Use the name of a political party or political body?
- 11) Refer to a racial, religious, or ethnic group?
- 12) Refer to any activity prohibited by law?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	PL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Initial	DL

If the answer to any of these questions is "yes," your proposed ballot designation is likely to be rejected.

X

Candidate's Signature

Date Signed: Month/Day/Year

For your reference, attached are Elections Code sections 13107, 13107.3, and 13107.5, and California Code of Regulations (CCR), title 2, section 20711. You also may wish to consult CCR, title 2, sections, 20712-20719 (found at [www.sos.ca.gov](http://www.sos.ca.gov)).



California Secretary of State  
BALLOT DESIGNATION WORKSHEET

June 2, 2026 Statewide Direct Primary Election (Elections Code §§ 13107, 13107.3, 13107.5; California Code of Regulations § 20711)

Page 3

COMPLETE THIS PAGE ONLY IF one or more Alternate Ballot Designation(s) are provided. If this page is not applicable, please initial: \_\_\_\_\_.

Justification for  
Alternate Ballot  
Designation(s) 1

A

Justification for use of 1<sup>st</sup> PVO:

I am Executive Director of nonprofit Chinese American Voters Education Committee

Current or most recent job title: Executive Director

Start Date: 1993 End Date: Current

Employer Name or Business:

Chinese American Voters Education Committee

Person who can verify this information:

Name: Doug Chan

Phone Number(s):

Justification for use of 2<sup>nd</sup> PVO:

Current or most recent job title:

Start Date:

End Date:

Employer Name or Business:

Person who can verify this information:

Name:

Phone Number(s):

Email:

Justification for use of 3<sup>rd</sup> PVO:

Current or most recent job title:

Start Date:

End Date:

Employer Name or Business:

Person who can verify this information:

Name:

Phone Number(s):

Email:

Justification for  
Alternate Ballot  
Designation(s) 2

B

Justification for use of 1<sup>st</sup> PVO:

Current or most recent job title:

Start Date:

End Date:

Employer Name or Business:

Person who can verify this information:

Name:

Phone Number(s):

Email:

Justification for use of 2<sup>nd</sup> PVO:

Current or most recent job title:

Start Date:

End Date:

Employer Name or Business:

Person who can verify this information:

Name:

Phone Number(s):

Email:

Justification for use of 3<sup>rd</sup> PVO:

Current or most recent job title:

Start Date:

End Date:

Employer Name or Business:

Person who can verify this information:

Name:

Phone Number(s):

Email:



California Secretary of State  
BALLOT DESIGNATION WORKSHEET

June 2, 2026 Statewide Direct Primary Election (Elections Code §§ 13107, 13107.3, 13107.5; California Code of Regulations § 20711)

Page 4

*For your reference, the relevant provisions of Elections Code section 13107 are reproduced below:*

(a) With the exception of candidates for Justice of the State Supreme Court or court of appeal, immediately under the name of each candidate, and not separated from the name by any line, unless the designation made by the candidate pursuant to Section 8002.5 must be listed immediately below the name of the candidate pursuant to Section 13105, and in that case immediately under the designation, may appear at the option of the candidate only one of the following designations:

(1) Words designating the elective city, county, district, state, or federal office which the candidate holds at the time of filing the nomination documents to which the candidate was elected by vote of the people.

(2) The word "incumbent" if the candidate is a candidate for the same office which the candidate holds at the time of filing the nomination papers, and was elected to that office by a vote of the people. A candidate shall not use the word "incumbent" if the candidate was elected to their office in an at-large election and is a candidate in a district-based election.

(3) No more than three words designating either the current principal professions, vocations, or occupations of the candidate, or the principal professions, vocations, or occupations of the candidate during the calendar year immediately preceding the filing of nomination documents.

(4) The phrase "appointed incumbent" if the candidate holds an office by virtue of appointment, and the candidate is a candidate for election to the same office, or, if the candidate is a candidate for election to the same office or to some other office, the word "appointed" and the title of the office. In either instance, the candidate may not use the unmodified word "incumbent" or any words designating the office unmodified by the word "appointed." However, the phrase "appointed incumbent" shall not be required of a candidate who seeks reelection to an office which the candidate holds and to which the candidate was appointed, as a nominated candidate, in lieu of an election, pursuant to Sections 5326 and 5328 of the Education Code or Section 7228, 7423, 7673, 10229, or 10515 of this code.

(b) (1) Except as specified in paragraph (2), for candidates for judicial office, immediately under the name of each candidate, and not separated from the name by any line, only one of the following designations may appear at the option of the candidate:

(A) Words designating the city, county, district, state, or federal office held by the candidate at the time of filing the nomination documents.

(B) The word "incumbent" if the candidate is a candidate for the same office that the candidate holds at the time of filing the nomination papers.

(C) No more than three words designating either the current principal professions, vocations, or occupations of the candidate, or the principal professions, vocations, or occupations of the candidate during the calendar year immediately preceding the filing of nomination documents.

(2) For a candidate for judicial office who is an active member of the State Bar employed by a city, county, district, state, or by the United States, the designation shall appear as one of the following:

(A) Words designating the actual job title, as defined by statute, charter, or other governing instrument.

(B) One of the following ballot designations: "Attorney," "Attorney at Law," "Lawyer," or "Counselor at Law." The designations "Attorney" and "Lawyer" may be used in combination with one other current principal profession, vocation, or occupation of the candidate, or the principal profession, vocation, or occupation of the candidate during the calendar year immediately preceding the filing of nomination documents.

(3) A designation made pursuant to subparagraph (A) of paragraph (1) or paragraph (2) shall also contain relevant qualifiers, as follows:

(A) If the candidate is an official or employee of a city, the name of the city shall appear preceded by the words "City of."

(B) If the candidate is an official or employee of a county, the name of the county shall appear preceded by the words "County of."

(C) If the candidate is an official or employee of a city and county, the name of the city and county shall appear preceded by the words "City and County."

(D) If the candidate performs quasi-judicial functions for a governmental agency, the full name of the agency shall be included.

(c) A candidate for superior court judge who is an active member of the State Bar and practices law as one of the candidate's principal professions shall use one of the following ballot designations as the candidate's ballot designation: "Attorney," "Attorney at Law," "Lawyer," or "Counselor at Law." The designations "Attorney" and "Lawyer" may be used in combination with one other current principal profession, vocation, or occupation of the candidate, or the principal profession, vocation, or occupation of the candidate during the calendar year immediately preceding the filing of nomination documents.

(d) For purposes of this section, all California geographical names shall be considered to be one word. Hyphenated words that appear in any generally available standard reference dictionary, published in the United States at any time within the 10 calendar years immediately preceding the election for which the words are counted, including a generally available standard reference dictionary published online, shall be considered as one word. Each part of all other hyphenated words shall be counted as a separate word.

(e) The Secretary of State and any other elections official shall not accept a designation of which any of the following would be true:



CITY AND COUNTY OF SAN FRANCISCO  
**DEPARTMENT OF ELECTIONS**

John Arntz, Director

Candidate Statement of Qualifications  
(CAEC §§ 13307-13308)  
June 2, 2026, Statewide Direct Primary Election – Board of Supervisors

Official Filing Form

2025 JAN -5 AM 11:00

2025 JAN -5 AM 11:00

County Elections Official

By: \_\_\_\_\_

Date Issued: \_\_\_\_\_

Candidate Name: David E. Lee

Office Sought: District 4 Supervisor

Please complete the following sections:

1

- ☐ I will **NOT** file a Candidate Statement of Qualifications  
☒ I will file a Candidate Statement of Qualifications  
☒ I will send an electronic copy of my statement in Word format to the Department at [publications@sfgov.org](mailto:publications@sfgov.org) no later than 5:00 PM on the day after the close of the nomination period.

Signature of Candidate: \_\_\_\_\_ Date 1/5/26

2

*This statement will be reproduced exactly as written. You may not make changes or corrections after the statement has been submitted. Please type or print neatly. If handwritten information or a revision is unclear, Department staff will interpret the provided information to the best of their abilities. This interpretation is final.*

3

Name as it will appear with statement: David E. Lee

My occupation is: Educator

My qualifications are:

Keep Text Within the Vertical Lines. Word count starts here:

The Sunset needs an independent voice at City Hall!

As a Sunset homeowner, lifelong west side San Franciscan, and an educator, I will always put the needs of our residents first. I will fight to represent you in City Hall and address your most pressing concerns:

- Reopen the Great Highway: On my first day I will put the compromise back to the ballot. On weekdays, people need to get to work and school. On weekends, it can go back to being a park.
- Housing: I oppose the Mayor's Family Zoning Plan. Too many residents are being pushed out. I support having more community input on big housing decisions. I'll protect our communities and build affordable housing with the support of the community. We don't need runaway growth that threatens to destroy our neighborhood.
- Public Safety: While downtown gets the vast majority of attention, I'll fight for more resources in the Sunset to keep residents and small businesses safe. I want to staff up our police station and achieve faster response times.

Please join former California State Senator and San Francisco Judge Quentin Kopp, San Francisco Judge Lillian Sing (retired), San Francisco Judge Julie Tang (retired), and San Francisco Judge Alfred Knoll (retired) and vote for David Lee for District 4 Supervisor.

[www.DavidLeeForSupervisor.com](http://www.DavidLeeForSupervisor.com)

I, Alfred P. Knoll, wish to endorse David Lee on his  
"Candidate Statement of Qualifications," for the San Francisco Board of  
Supervisor for District 4 for the June 2026 election.



Signature of Endorser

Judge (Ret)

Title

12/19/25

Date

2025 JUN 5 AM 11:01

I, Julie TANG, wish to endorse David Lee on his  
"Candidate Statement of Qualifications," for the San Francisco Board of  
Supervisor for District 4 for the June 2026 election.



Signature of Endorser

Retired Judge

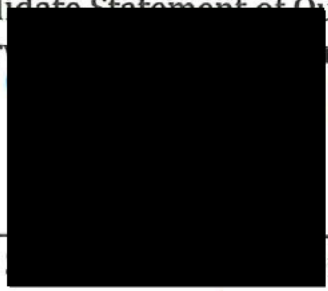
Title

Jan 1, 2026

Date

2025 JAN -5 AM 11:00

I, LILLIAN SING, wish to endorse David Lee on his  
"Candidate Statement of Qualifications," for the San Francisco Board of  
Superior Court Judges for the June 2026 election.



Judge, ret.  
Title

12-31-2025  
Date

2025 JUN -5 AM 11:00  
00:11:00

**STATEMENT OF ECONOMIC INTERESTS**  
**COVER PAGE**  
**A PUBLIC DOCUMENT**

Date Initial Filing Received  
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)  
Lee David Edward

**1. Office, Agency, or Court**

Agency Name (Do not use acronyms)

City and County of San Francisco Supervisor

Division, Board, Department, District, if applicable

Your Position

4

District Supervisor

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

Agency: \_\_\_\_\_ Position: \_\_\_\_\_

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

☐ State

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

☐ Multi-County \_\_\_\_\_

☒ County of San Francisco

☒ City of San Francisco

☐ Other \_\_\_\_\_

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

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

-or-

The period covered is \_\_\_\_\_, through  
December 31, 2024.

☐ Leaving Office: Date Left \_\_\_\_\_  
(Check one circle below.)

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

-or-

☐ Assuming Office: Date assumed \_\_\_\_\_

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

☒ Candidate: Date of Election 6/2/26 and office sought, if different than Part 1: \_\_\_\_\_

**4. Schedule Summary (required)**

► Total number of pages including this cover page: \_\_\_\_\_

**Schedules attached**

☒ Schedule A-1 - Investments - schedule attached

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

☒ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☒ Schedule B - Real Property - schedule attached

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

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

**5. Verification**

MAILING ADDRESS (Business or \_\_\_\_\_) STATE ZIP CODE

akeport, CA

95453

DAYTIME TELEPHONE NUMBER

EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

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

Date Signed

01/05/2026

(month, day, year)

Signature

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

## Types of Statements

### Assuming Office Statement:

If you are a newly appointed official or are newly employed in a position designated, or that will be designated, in a state or local agency's conflict of interest code, your assuming office date is the date you were sworn in or otherwise authorized to serve in the position. If you are a newly elected official, your assuming office date is the date you were sworn in.

- Report: Investments, interests in real property, and business positions held on the date you assumed the office or position must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date you assumed the office or position.

For positions subject to confirmation by the State Senate or the Commission on Judicial Appointments, your assuming office date is the date you were appointed or nominated to the position.

- Example: Maria Lopez was nominated by the Governor to serve on a state agency board that is subject to state Senate confirmation. The assuming office date is the date Maria's nomination is submitted to the Senate. Maria must report investments, interests in real property, and business positions Maria holds on that date, and income (including loans, gifts, and travel payments) received during the 12 months prior to that date.

If your office or position has been added to a newly adopted or newly amended conflict of interest code, use the effective date of the code or amendment, whichever is applicable.

- Report: Investments, interests in real property, and business positions held on the effective date of the code or amendment must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the effective date of the code or amendment.

### Annual Statement:

Generally, the period covered is January 1, 2024, through December 31, 2024. If the period covered by the statement is different than January 1, 2024, through December 31, 2024, (for example, you assumed office between October 1, 2023, and December 31, 2023 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2024.
- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

### Leaving Office Statement:

Generally, the period covered is January 1, 2024, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2024, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2023, and December 31, 2023, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2024.

### Candidate Statement:

If you are filing a statement in connection with your candidacy for state or local office, investments, interests in real property, and business positions held on the date of filing your declaration of candidacy must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date of filing your declaration of candidacy is reportable. Do not change the preprinted dates on Schedules A-1, A-2, and B.

Candidates running for local elective offices (e.g., county sheriffs, city clerks, school board trustees, or water district board members) must file candidate statements, as required by the conflict of interest code for the elected position. The code may be obtained from the agency of the elected position.

### Amendments:

If you discover errors or omissions on any statement, file an amendment as soon as possible. You are only required to amend the schedule that needs to be revised; it is not necessary to refile the entire form. Obtain amendment schedules from the FPPC website at [www.fppc.ca.gov](http://www.fppc.ca.gov).

**Note:** Once you file your statement, you may not withdraw it. All changes must be noted on amendment schedules.

### Expanded Statement:

If you hold multiple positions subject to reporting requirements, you may be able to file an expanded statement for each position, rather than a separate and distinct statement for each position. The expanded statement must cover all reportable interests for all jurisdictions and list all positions on the Form 700 or on an attachment for which it is filed. The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1.

# SCHEDULE A-1

## Investments

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

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

### NAME OF BUSINESS ENTITY

CCL

### GENERAL DESCRIPTION OF THIS BUSINESS

Carnival Corp

### FAIR MARKET VALUE

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

### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24  
ACQUIRED DISPOSED

### NAME OF BUSINESS ENTITY

AFRM

### GENERAL DESCRIPTION OF THIS BUSINESS

AFFIRM HOLDINGS INC

### FAIR MARKET VALUE

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

### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24  
ACQUIRED DISPOSED

### NAME OF BUSINESS ENTITY

FROG

### GENERAL DESCRIPTION OF THIS BUSINESS

JFROG LTD

### FAIR MARKET VALUE

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

### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24  
ACQUIRED DISPOSED

### NAME OF BUSINESS ENTITY

RCL

### GENERAL DESCRIPTION OF THIS BUSINESS

ROYAL CARIBBEAN GROUP

### FAIR MARKET VALUE

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

### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24  
ACQUIRED DISPOSED

### NAME OF BUSINESS ENTITY

PLTR

### GENERAL DESCRIPTION OF THIS BUSINESS

PALANTIR TECHNOLOGIES INC

### FAIR MARKET VALUE

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

### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24  
ACQUIRED DISPOSED

### NAME OF BUSINESS ENTITY

ABNB

### GENERAL DESCRIPTION OF THIS BUSINESS

AIRBNB INC

### FAIR MARKET VALUE

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

### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24  
ACQUIRED DISPOSED

Comments:



# SCHEDULE A-1

## Investments

### Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

#### NAME OF BUSINESS ENTITY

TCEHY

#### GENERAL DESCRIPTION OF THIS BUSINESS

TENCENT HOLDINGS LTD

#### FAIR MARKET VALUE

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

#### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24 / / 24  
 ACQUIRED DISPOSED

#### NAME OF BUSINESS ENTITY

TSLA

#### GENERAL DESCRIPTION OF THIS BUSINESS

TESLA INC

#### FAIR MARKET VALUE

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

#### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24 / / 24  
 ACQUIRED DISPOSED

#### NAME OF BUSINESS ENTITY

#### GENERAL DESCRIPTION OF THIS BUSINESS

#### FAIR MARKET VALUE

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

#### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24 / / 24  
 ACQUIRED DISPOSED

#### NAME OF BUSINESS ENTITY

UAL

#### GENERAL DESCRIPTION OF THIS BUSINESS

UNITED AIRLINES HOLDINGS INC

#### FAIR MARKET VALUE

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

#### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24 / / 24  
 ACQUIRED DISPOSED

#### NAME OF BUSINESS ENTITY

VITL

#### GENERAL DESCRIPTION OF THIS BUSINESS

VITAL FARMS INC

#### FAIR MARKET VALUE

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

#### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24 / / 24  
 ACQUIRED DISPOSED

#### NAME OF BUSINESS ENTITY

#### GENERAL DESCRIPTION OF THIS BUSINESS

#### FAIR MARKET VALUE

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

#### NATURE OF INVESTMENT

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

IF APPLICABLE, LIST DATE:

/ / 24 / / 24  
 ACQUIRED DISPOSED

Comments:



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

<b>CALIFORNIA FORM 700</b>
FAIR POLITICAL PRACTICES COMMISSION
Name <u>David Edward Lee</u>

<b>1. BUSINESS ENTITY OR TRUST</b>	
Name <u>Jing Lee State Farm Insurance Agency</u>	
Address (Business Address Acceptable) <u>4444 Geary Blvd., #300 San Francisco CA 94118</u>	
Check one <input type="checkbox"/> Trust, go to 2 <input checked="" type="checkbox"/> Business Entity, complete the box, then go to 2	
GENERAL DESCRIPTION OF THIS BUSINESS <u>Insurance</u>	
FAIR MARKET VALUE <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: <div style="display: flex; justify-content: space-around;"><div>/ /24 ACQUIRED</div><div>/ /24 DISPOSED</div></div>
NATURE OF INVESTMENT <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other	
YOUR BUSINESS POSITION <u>Spouse of 100% owner Jing Lee</u>	

<b>2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)</b>	
<input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> OVER \$100,000

<b>3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE</b> (Attach a separate sheet if necessary.)	
<input type="checkbox"/> None    or <input type="checkbox"/> Names listed below	

<b>4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST</b>	
Check one box: <input type="checkbox"/> INVESTMENT <input type="checkbox"/> REAL PROPERTY	
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property	
Description of Business Activity or City or Other Precise Location of Real Property	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: <div style="display: flex; justify-content: space-around;"><div>/ /24 ACQUIRED</div><div>/ /24 DISPOSED</div></div>
NATURE OF INTEREST <input type="checkbox"/> Property Ownership/Deed of Trust <input type="checkbox"/> Stock <input type="checkbox"/> Partnership	
<input type="checkbox"/> Leasehold <u>                    </u> Yrs. remaining <input type="checkbox"/> Other <u>                    </u>	
<input type="checkbox"/> Check box if additional schedules reporting investments or real property are attached	

Comments: \_\_\_\_\_

<b>1. BUSINESS ENTITY OR TRUST</b>	
Name _____	
Address (Business Address Acceptable) _____	
Check one <input type="checkbox"/> Trust, go to 2 <input type="checkbox"/> Business Entity, complete the box, then go to 2	
GENERAL DESCRIPTION OF THIS BUSINESS	
FAIR MARKET VALUE <input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: <div style="display: flex; justify-content: space-around;"><div>/ /24 ACQUIRED</div><div>/ /24 DISPOSED</div></div>
NATURE OF INVESTMENT <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other	
YOUR BUSINESS POSITION _____	

<b>2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)</b>	
<input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000

<b>3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE</b> (Attach a separate sheet if necessary.)	
<input type="checkbox"/> None    or <input type="checkbox"/> Names listed below	

<b>4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST</b>	
Check one box: <input type="checkbox"/> INVESTMENT <input type="checkbox"/> REAL PROPERTY	
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property	
Description of Business Activity or City or Other Precise Location of Real Property	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: <div style="display: flex; justify-content: space-around;"><div>/ /24 ACQUIRED</div><div>/ /24 DISPOSED</div></div>
NATURE OF INTEREST <input type="checkbox"/> Property Ownership/Deed of Trust <input type="checkbox"/> Stock <input type="checkbox"/> Partnership	
<input type="checkbox"/> Leasehold <u>                    </u> Yrs. remaining <input type="checkbox"/> Other <u>                    </u>	
<input type="checkbox"/> Check box if additional schedules reporting investments or real property are attached	

## Instructions – Schedules A-1 and A-2 Investments

“Investment” means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 14.)

### Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 14.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 9, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 16.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 17, for more information on disclosing trusts.)
- Business trusts

### You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 14.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

### Reminders

- Do you know your agency’s jurisdiction?
- Did you hold investments at any time during the period covered by this statement?
- Code filers – your disclosure categories may only require disclosure of specific investments.

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 16.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 17.)

**Use Schedule A-1** to report ownership of less than 10% (e.g., stock). Schedule C (Income) may also be required if the investment is not a stock or corporate bond. (See second example below.)

**Use Schedule A-2** to report ownership of 10% or greater (e.g., a sole proprietorship).

### To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity. Do not use acronyms for the name of the business entity, unless it is one that is commonly understood by the public.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 21 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

### Examples:

Frank Byrd holds a state agency position. Frank’s conflict of interest code requires full disclosure of investments. Frank must disclose stock holdings of \$2,000 or more in any company that is located in or does business in California, as well as those stocks held by Frank’s spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. Alice has a 4% interest, worth \$5,000, in a limited partnership located in the city. Alice must disclose the partnership on Schedule A-1 and income of \$500 or more received from the partnership on Schedule C.

CITY

CITY

## Instructions – Schedule A-2

### Investments, Income, and Assets of Business Entities/Trusts

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Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 14.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the investment or real property interest was \$2,000 or more during the reporting period.

#### To Complete Schedule A-2:

**Part 1.** Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, check "Business Entity" and complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the highest fair market value of your investment during the reporting period.
- If you initially acquired or entirely disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management). A business position held by your spouse is not reportable.

**Part 2.** Check the box indicating **your pro rata** share of the **gross** income received **by** the business entity or trust. This amount includes your pro rata share of the **gross** income **from** the business entity or trust, as well as your community property interest in your spouse's or registered domestic partner's share. Gross income is the total amount of income before deducting expenses, losses, or taxes.

**Part 3.** Disclose the name of each source of income that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction, as follows:

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 12, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. 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 are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 9.)

You may be required to disclose sources of income located outside your jurisdiction. For example, you may have a client who resides outside your jurisdiction who does business on a regular basis with you. Such a client, if a reportable source of \$10,000 or more, must be disclosed.

Mark "None" if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. (See Reference Pamphlet, page 15, for information on procedures to request an exemption from disclosing privileged information.)

**Part 4.** Report any investments or interests in real property held or leased **by the entity or trust** identified in Part 1 if your pro rata share of the interest held was \$2,000 or more during the reporting period. Attach additional schedules or use FPPC's Form 700 Excel spreadsheet if needed.


- Check the applicable box identifying the interest held as real property or an investment.
- If investment, provide the name and description of the business entity.
- If real property, report the precise location (e.g., an assessor's parcel number or address).
- Check the box indicating the highest fair market value of your interest in the real property or investment during the reporting period. (Report the fair market value of the portion of your residence claimed as a tax deduction if you are utilizing your residence for business purposes.)
- Identify the nature of your interest.
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property or investment during the reporting period.

Name

## SCHEDULE B

### Interests in Real Property

(Including Rental Income)

  
 CITY San Francisco, CA 94132

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

IF APPLICABLE, LIST DATE:  
 ACQUIRED 1/24 DISPOSED 1/24

NATURE OF INTEREST  
☒ Ownership/Deed of Trust ☐ Easement  
☐ Leasehold \_\_\_\_\_ Yrs. remaining ☐ Other \_\_\_\_\_

IF RENTAL PROPERTY, GROSS INCOME RECEIVED  
☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000  
☒ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.  
☐ None  
Gang Xiao

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_

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

IF APPLICABLE, LIST DATE:  
 ACQUIRED 1/24 DISPOSED 1/24

NATURE OF INTEREST  
☐ Ownership/Deed of Trust ☐ Easement  
☐ Leasehold \_\_\_\_\_ Yrs. remaining ☐ Other \_\_\_\_\_

IF RENTAL PROPERTY, GROSS INCOME RECEIVED  
☐ \$0 - \$499 ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000  
☐ \$10,001 - \$100,000 ☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.  
☐ None

\* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

INTEREST RATE \_\_\_\_\_ TERM (Months/Years) \_\_\_\_\_

\_\_\_\_\_% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

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

☐ Guarantor, if applicable

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

INTEREST RATE \_\_\_\_\_ TERM (Months/Years) \_\_\_\_\_

\_\_\_\_\_% ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

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

☐ Guarantor, if applicable

Comments: \_\_\_\_\_



# CALIFORNIA FORM 700

## FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

► **1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME

State of California  
ADDRESS (Business Address Acceptable)

ADDRESS (Business Address Acceptable)

P.O. Box 942850 Sacramento CA 94250

BUSINESS ACTIVITY, IF ANY, OF SOURCE

San Francisco State University  
YOUR BUSINESS POSITION

## YOUR BUSINESS POSITION

Part-time Lecturer

☐ No Income - Business Position Only☒ \$1,001 - \$10,000☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☒ Salary ☐ Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

☐ Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)

☐ Sale of \_\_\_\_\_  
(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or ☐ Rental Income, list each source of \$10,000 or more

(Describe)

☐ Other \_\_\_\_\_  
(Describe)

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

TERM (Months/Years)

\_\_\_\_\_ % ☐ None

☐ None ☐ Personal residence

☐ Real Property \_\_\_\_\_  
Street address

---

City

☐ Guarantor \_\_\_\_\_

☐ Other \_\_\_\_\_  
(Describe)

Comments: \_\_\_\_\_

## Instructions – Schedule B Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 14.)

### Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 15.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 16.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

### You are not required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 17.)
  - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

### To Complete Schedule B:

- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold, disclose the number of years remaining on the lease.

### Reminders

- Income and loans already reported on Schedule B are not also required to be reported on Schedule C.
- Real property already reported on Schedule A-2, Part 4 is not also required to be reported on Schedule B.
- Code filers – do your disclosure categories require disclosure of real property?

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the first and last name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **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 are not reportable.**

When reporting a loan:

- Provide the name and address of the lender.
- Describe the lender's business activity.
- Disclose the interest rate and term of the loan. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was established.
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule C.

### Example:

Allison Gande is a city planning commissioner. During the reporting period, Allison received rental income of \$12,000, from a single tenant who rented property owned in the city's jurisdiction. If Allison received \$6,000 each from two tenants, the tenants' names would not be required because no single tenant paid her \$10,000 or more. A married couple is considered a single tenant.

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 4600 24th Street	
CITY Sacramento	
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	IF APPLICABLE, LIST DATE: ACQUIRED <input checked="" type="checkbox"/> / XX / XX DISPOSED <input type="checkbox"/> / XX / XX
NATURE OF INTEREST <input type="checkbox"/> Ownership/Deed of Trust <input type="checkbox"/> Leasehold <input type="checkbox"/> Easement <input type="checkbox"/> Other	
IF RENTAL PROPERTY, GROSS INCOME RECEIVED <input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> 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. <input type="checkbox"/> None Henry Wells	
NAME OF LENDER* Sophia Petroillo	
ADDRESS (Business Address Acceptable) 2121 Blue Sky Parkway, Sacramento	
BUSINESS ACTIVITY, IF ANY, OF LENDER Restaurant Owner	
INTEREST RATE 8 % <input type="checkbox"/> None	TERM (Months/Years) 15 Years
HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	
<input type="checkbox"/> Guarantor, if applicable	
Comments:	