

**IOWA GENERAL ASSEMBLY
CENTRAL LEGISLATIVE STAFF AGENCIES
PERSONAL FINANCIAL DISCLOSURE FORM**

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(Last) (First) (Middle Initial)

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(Agency) (Agency Director)

Division I. Business, Occupation, Profession.

A. Name of Business, Occupation, or Profession: List each business, occupation, or profession in which you are engaged, regardless of the amount of income derived or time spent participating in the activity.

Examples:

- State the name of the legislative agency in which you are employed.
- If you are also self-employed and are not incorporated or are not doing business under a particular business name, also state that you are self-employed.
- If you are also employed outside of the General Assembly by a private individual, state the name of the individual employer.
- If, in addition to your legislative employment, you own your own corporation, are employed by a corporation, or are doing business under a particular business name, state the name of the business or corporation.
- If, in addition to your legislative employment, you are employed by a consulting firm, state the name of the consulting firm.

1. Legislative Services Agency
- 2.
- 3.
- 4.
- 5.

B. Nature of Business, Occupation, or Profession: State the nature of each of the businesses, occupations, or professions which you listed in Part "A" above, unless the nature of the business, occupation, or profession is already apparent from the information indicated above. The descriptions in this part should correspond by number to the numbers for each of the businesses, occupations, or professions listed in Part "A" above.

Examples:

- State your position or job title within your employing legislative agency.
- If you indicated that you were also self-employed in Part "A" above, you should list in this part the types of activities that you engage in and the goods or services that you provide.
- If you indicated that you were also employed by a particular private individual in Part "A" above, you should indicate in this part the type of services that you provide for the individual. If your position involves the sale of goods or services, the kinds of goods or services sold should also be indicated.
- If you indicated that you were also employed by a corporation or other similar organization in Part "A" above, you should indicate your position within the corporation or organization and the kinds of services rendered to or on behalf of the corporation or organization in this part. If you indicated that you are a teacher, the type of school or institution served should also be indicated. If you are providing legal services, the areas of practice should also be indicated.
- If you indicated in Part "A" above that you were also employed in a particular consulting firm, in this part you should indicate the kind of services provided and types of clients served.

1. Director, Legislative Services Agency
- 2.
- 3.
- 4.
- 5.

Division II. Sources of Gross Income Subject to Taxation.

In this division, list each source, by general description, from which you receive, or which generates, more than \$1,000 in annual gross income in each of the categories listed below. For purposes of this division, a source produces annual gross income if the revenue produced by the source is subject to federal or state income taxes. In completing the items listed below, list the nature or type of each company, business, financial institution, corporation, partnership, or other entity which produces for you more than \$1,000 of annual gross income. Neither the amount of income produced nor value of the holding is required to be listed in any of the items. Do not report income received by your spouse or other family members.

A. Securities: State the nature or type of the company in which stock, bonds, or other pecuniary interests are held that generate more than \$1,000 in annual gross income. For purpose of this item, income generated by multiple holdings in a single company are deemed received from a single source. For example, if you hold multiple shares of stock in a single corporation, you must add together the income received from all shares to determine the income received from the corporation. Stock "owned" through investment in a mutual fund should be shown by identifying the general nature or type of the mutual fund.

Financial Sector

B. Instruments of Financial Institutions: State the types of institutions in which you hold financial instruments that produce annual gross income in excess of \$1,000 and indicate the nature of the income, source e.g., savings account, certificate of deposit, etc.

Nothing to Report

C. Trusts: State the nature or type of any trust from which you receive more than \$1,000 of gross income annually. Indicate whether the trust is a family trust. If the income is received from a charitable trust or foundation in the form of a grant, the fact that the trust is a charitable trust should be noted.

Nothing to Report

D. Real Estate: State the general nature of real estate interests that generates more than \$1,000 of gross income annually, e.g., residential leasehold interest or farm leasehold interest. The size or location of the property interest is not required to be listed.

Nothing to Report

E. Retirement Systems: State the name of each pension plan or other corporation or company from which you receive more than \$1,000 annually in retirement benefits. If you receive a benefit jointly with another person, benefits with an annual values in excess of \$1,000 from which you actually benefit must also be listed. The name of the other person or persons is not to be listed, however.

Nothing to Report

Division III. Other Income Categories.

Other Reported Income: Provide a description of other sources of income producing over \$1,000 in annual gross income that have not been reported above, but which must be reported for income tax purposes. The amount or value of the source is not required to be listed.

Nothing to Report