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CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION A PUBLIC DOCUMENT

STATEMENT OF ECONOMIC INTERESTS COVER PAGE

Date Initial Filing Received Official Use Only

> E-Filed 04/02/2017 22:35:06

Filing ID: 164497655

NAME OF FILER	(LAST)		(FIRST)		(MIDDLE)
Whalen, Jame	es E				
1. Office, Ag	ency, or Court				
Agency Name	e (Do not use acronyms)				
CITY OF S	AN DIEGO				
Division, Boar	rd, Department, District, if applicable		Your Position		
Planning	Commission		Commission	ner	
► If filing for	multiple positions, list below or on an attachment	t. (Do not us	se acronyms)		
Agency:			Position:		
2. Jurisdicti	on of Office (Check at least one box)				
State	,		☐ Judge or Co	urt Commissioner (State	ewide Jurisdiction)
Multi-Cou	nty		County of _		
	San Diego		•		
	Statement (Check at least one box)				
Annual: -or-	The period covered is January 1, 2016, throu December 31, 2016	ıgh	Leaving Of (Check one	ffice: Date Left	<u></u>
.	The period covered is/, th December 31, 2016	rough	○ The pe leaving		ary 1, 2016, through the date of
Assumin	g Office: Date assumed/	-		iod covered is/. ng office.	/, through the date
Candidat	te: Election Year and offi	ce sought, if	different than Part 1:		
4. Schedule	Summary (must complete) ▶ Tota	l number	of pages including	this cover page	14
Schedules			ar pugar manus	,	
X Sche	edule A-1 - Investments – schedule attached		X Schedule C - Inc	ome. Loans. & Busine	ss Positions – schedule attached
X Sche	edule A-2 - Investments - schedule attached			ome – Gifts – schedule	
☐ Sche	edule B - Real Property - schedule attached		Schedule E - Inc	ome – Gifts – Travel P	Payments - schedule attached
-or-					
☐ None -	No reportable interests on any schedu	le			
5. Verificatio	n				
MAILING ADDRE (Business or Age	SS STREET ency Address Recommended - Public Document)	CITY		STATE	ZIP CODE
		San	Diego	CA	92108-2820
DAYTIME TELEF	PHONE NUMBER		E-MAIL ADDRESS		
()	Il reasonable dilinense in preparing this statemen	l house mou	iowad this statement an	d to the best of my kno	uuladaa tha information aantainad
	Ill reasonable diligence in preparing this statement any attached schedules is true and complete. I				wiedge the information contained
I certify unde	er penalty of perjury under the laws of the Sta	ate of Califo	rnia that the foregoing	g is true and correct.	
Date Signed	04/02/2017		Signature <u>James E</u>	Whalen	
	(month, day, year)		(Fi	ile the originally signed stateme	nt with your filing official.)

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Royal Dutch Shell PLC A-Adr	Chevron Corp
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Energy	Energy
FAIR MARKET VALUE	FAIR MARKET VALUE
□ \$2,000 - \$10,000	□ \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT X Stock Other	NATURE OF INVESTMENT Stock Other
(Describe)	(Describe)
Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)	Partnership Olncome Received of \$0 - \$499 Olncome Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
ConocoPhillips	Phillips 66
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Energy	Energy
FAID MADIZET VALUE	FAIR MARKET VALUE
FAIR MARKET VALUE X \$2,000 - \$10,000 \$10,001 - \$100,000	FAIR MARKET VALUE \$\Bigcap \text{\$\sigma} \$\
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT Stock Other
X Stock Other (Describe)	X Stock Other (Describe)
Partnership Olncome Received of \$0 - \$499	Partnership Olncome Received of \$0 - \$499
○ Income Received of \$500 or More (Report on Schedule C)	○ Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/	ACQUIRED DISPOSED
Nodolivep Piol Coep	NOGOTILES BIOI COLD
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
schlumberger LTD	Total SA Spon Adr
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Energy	Energy
FAIR MARKET VALUE	FAIR MARKET VALUE
\$2,000 - \$10,000	\$2,000 - \$10,000
S100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock Other	X Stock Other
— (Describe) ☐ Partnership ◯ Income Received of \$0 - \$499	(Describe) ☐ Partnership ◯ Income Received of \$0 - \$499
☐ Partnership ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Schedule C)	☐ Partnership ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Schedule C)
IE ADDITIONALE LIGHT DATE	IS APPLICABLE LIGHT BATE
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
International Paper Co	Boeing Company
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Materials	Industrials
FAIR MARKET VALUE	FAIR MARKET VALUE
\$2,000 - \$10,000	\$2,000 - \$10,000 \textbf{X} \$10,001 - \$100,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock Other(Describe)	X Stock Other(Describe)
Partnership Oncome Received of \$0 - \$499 Oncome Received of \$500 or More (Report on Schedule C)	Partnership
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
General Electric Company	United Parcel Service- CL B
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Industrials	Industrials
FAIR MARKET VALUE	FAIR MARKET VALUE
\$2,000 - \$10,000 X \$10,001 - \$100,000	\$2,000 - \$10,000 \[\overline{X} \] \$10,001 - \$100,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock Other	X Stock Other
(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)
O modific Processed of word (Proposition Considered)	Indiana received or ware (report or conduct or
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Target Corp	Altria Group Inc
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Consumer Discretionary	Consumer Staples
FAIR MARKET VALUE	FAIR MARKET VALUE
\$2,000 - \$10,000X \$10,001 - \$100,000	☐ \$2,000 - \$10,000
S100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock Other	X Stock Other
(Describe)	(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Schedule C)	Partnership O Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)
S State of the state of	S
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED
	H

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Pepsico Incorporated	Philip Morris Intl Inc
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Consumer Staples	Consumer Staples
FAIR MARKET VALUE	FAIR MARKET VALUE
\$2,000 - \$10,000	X \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT Stock Other	NATURE OF INVESTMENT Stock Other
(Describe)	(Describe)
Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)	Partnership
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Abbvie Inc	Amgen Inc
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Health Care	Health Care
FAIR MARKET VALUE	FAIR MARKET VALUE
\$2,000 - \$10,000 X \$10,001 - \$100,000	[X] \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
NATURE OF INVESTMENT Stock Other	NATURE OF INVESTMENT Stock Other
(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)
Theorie Necessal of \$600 of World (Nepolt of Schedule of	Theorie Necessal of \$600 of World (Report on Schedule of
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
	_03 /_28 /_16/
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Johnson & Johnson	Lilly Eli & Company
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Health Care	Health Care
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	\$2,000 - \$10,000
S100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock Other(Describe)	X Stock Other(Describe)
Partnership O Income Received of \$0 - \$499	Partnership O Income Received of \$0 - \$499
○ Income Received of \$500 or More (Report on Schedule C)	○ Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED
•	

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Pfizer Inc	Blackrock Inc
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Health Care	Financials
FAIR MARKET VALUE \$2,000 - \$10,000 \$100,001 - \$1,000,000 Over \$1,000,000	FAIR MARKET VALUE X \$2,000 - \$10,000 \$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT Stock Other(Describe) □ Partnership ○ Income Received of \$0 - \$499	NATURE OF INVESTMENT
○ Income Received of \$500 or More (Report on Schedule C)	Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
JPMorgan Chase & Co	Metlife
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Financials	Financials
FAIR MARKET VALUE \$2,000 - \$10,000 \$100,001 - \$1,000,000 Over \$1,000,000	FAIR MARKET VALUE \$\overline{\Implies} \\$2,000 - \$10,000
NATURE OF INVESTMENT Stock	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:	IF APPLICABLE, LIST DATE:
/	
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
PNC Financial Services Group	Synchrony Financial
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Financials	Financials
FAIR MARKET VALUE	FAIR MARKET VALUE
<u> </u>	X \$2,000 - \$10,000
S100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock (Describe)	X Stock Other (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	

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Travelers Cos Inc	Wells Fargo & Company
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Financials	Financials
FAIR MARKET VALUE	FAIR MARKET VALUE
\$2,000 - \$10,000	\$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
_	
NATURE OF INVESTMENT Stock Other	NATURE OF INVESTMENT Stock Other
(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
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Applied Materials Inc	Cisco Systems Inc
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Technology	Technology
	FAIR MARKET VALUE
\$2,000 - \$10,000 X \$10,001 - \$100,000	
\$100,001 - \$1,000,000 St, \$100,000	\$100,001 - \$1,000,000 Sylven \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock Other	X Stock Other
Partnership O Income Received of \$0 - \$499	Partnership O Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
JE ADDIJOADJE JIGT DATE	JE ADDIJOADJE JOT DATE
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
NAME OF BUSINESS ENTITY	NAME OF BUSINESS ENTITY
Microchip Technology Inc	Microsoft Corp
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
SENERAL BESONII HON SI THIS BOSINESS	
Information Technologies	Information Technology
FAIR MARKET VALUE	FAIR MARKET VALUE
<u>X</u> \$10,000 <u>X</u> \$100,000	☐ \$2,000 - \$10,000
S100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock Other	X Stock Other
(Describe)	☐ Partnership ◯ Income Received of \$0 - \$499
☐ Partnership ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Schedule C)	Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
	06_/_24/_16
ACQUIRED DISPOSED	ACQUIRED DISPOSED

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Qualcomm Inc	Twain Semiconductor-SP ADR
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Information Technology	Technology
——————————————————————————————————————	
FAIR MARKET VALUE	FAIR MARKET VALUE
<u>X</u> \$2,000 - \$10,000 <u> </u>	<u>X</u> \$10,001 - \$100,000
\$100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock Other	X Stock Other (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
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Xilinx Inc	AT&T
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Information Technologies	Telecommunications
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	\$2,000 - \$10,000 X \$10,001 - \$100,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
X Stock Other	X Stock Other
(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
NAME OF BUSINESS ENTITY	NAME OF BUSINESS ENTITY
Verizon Communications	Altera Corp SR Global Notes
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Telecommunications Services	Industrial
FAIR MARKET VALUE	FAIR MARKET VALUE
\$2,000 - \$10,000 \textbf{X} \$10,001 - \$100,000	FAIR MARKET VALUE
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT Stock Other	NATURE OF INVESTMENT ☐ Stock ☒ Other Corporate Bond
(Describe)	(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Schedule C)	Partnership Oncome Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
	06 / 00 / 16
ACQUIRED DISPOSED	
	11

Comments: All Stocks and Corporate Bonds listed in Schedule A-1 are part of a SEP IRA account.

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

NAME OF BUILDINGS FAITTY	A MANE OF BUODIEGO FAITITA
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
AT&T Senior Global Notes 5.8%	Cimarex Energy Co Sr Nts C5/17 5.87%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Industrial	Industrial
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	X \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT Stock X Other Corporate Bonds	NATURE OF INVESTMENT Stock X Other Corporate Bonds
(Describe)	(Describe)
Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)	Partnership Olncome Received of \$0 - \$499 Olncome Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
10 / 12 / 16/	06 / 02 / 16/
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Expedia Inc SR Global Notes 7.456%	Ford Motor Credit Co Sr Notes 8.125%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Industrial	Industrial
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	X \$2,000 - \$10,000 \$10,001 - \$100,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock X Other Corporate Bond (Describe)	Stock X Other Corporate Bond (Describe)
Partnership () Income Received of \$0 - \$499	Partnership () Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)	Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED
ACQUINED DISPOSED	AOQUINED DISFOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
General Electric Cap Corp 5.625%	General Motors Finance Sr Glbl 6.75%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Industrial	Industrial Corp Bonds
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	X \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT ☐ Stock	NATURE OF INVESTMENT ☐ Stock 図 Other Corporate Bonds
(Describe)	(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499 ☐ 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)
Theorne received of \$500 of Infore (Report of Schedule C)	Theorne Necessed of \$500 of Islate (Report of Scriedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
	l I

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
National Oilwell Varco Sr Glbl 2.6%	Omnicom Group Inc Sr Notes 5.9%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Industrial	Industrial
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	X \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT ,
Stock X Other Corporate Bonds	Stock X Other Corporate Bond
(Describe) ☐ Partnership ◯ Income Received of \$0 - \$499	☐ (Describe) ☐ Partnership ◯ Income Received of \$0 - \$499
○ Income Received of \$500 or More (Report on Schedule C)	Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
<u>04 / 08 / 16 / /</u>	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Xerox Corp SR Global Notes 2.95%	Capital One Financial Sub Note 6.15%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Industrial Corporate Bonds	Finance Corporate Bonds
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	X \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock X Other Corporate Bonds	Stock X Other Corporate Bonds
(Describe)	(Describe)
Partnership O Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)	Partnership Olncome Received of \$0 - \$499 Olncome Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
	/ / 09 / 01 / 16
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Intl Lease Finance Corp Sr Nts, 6.25%	Bank of America Corp Sr Global, 5.7%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Finance	Banks
FAIR MARKET VALUE	FAIR MARKET VALUE
<u>X</u> \$2,000 - \$10,000 <u> </u>	X \$2,000 - \$10,000
S100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT ☐ Stock	NATURE OF INVESTMENT ☐ Stock ☑ Other Corporate Bonds
Stock X Other (Describe)	Stock X Other (Describe)
Partnership () Income Received of \$0 - \$499	Partnership O Income Received of \$0 - \$499
○ Income Received of \$500 or More (Report on Schedule C)	○ Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
09 / 02 / 16	11 / 20 / 16
	II NOGONIED BIOI GOED

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Bear Stearns Cos (JPM) Sr Glbl 7.250%	Citigroup Inc SR Glbl Notes 2.65%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Banks	Banks-Corporate Bonds
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	X \$2,000 - \$10,000 \$10,001 - \$100,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT Stock X Other Corporate Bond	NATURE OF INVESTMENT ☐ Stock ※ Other Corporate Bonds
(Describe)	(Describe)
Partnership O Income Received of \$0 - \$499 O Income Received of \$500 or More (Report on Schedule C)	Partnership Olncome Received of \$0 - \$499 Olncome Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/ / 06 / 28 / 16	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
NAME OF BUSINESS ENTITY	NAIVE OF BUSINESS ENTITY
Deutsche Bank Global 1.875%	Goldman Sachs Group Inc Senr 7.5%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Banks	Banks
FAIR MARKET VALUE	FAIR MARKET VALUE
\$10,001 - \$100,000 \$10,000 \$10,001 \$100,000 \$10,001 \$10,000 \$1	
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
\$100,001 \$1,000,000 \$Vel \$1,000,000	
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock X Other Corporate Bonds	Stock X Other Corporate Bond
(Describe) Partnership () Income Received of \$0 - \$499	(Describe) Partnership () Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)	Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
_09 / 29 / 16/	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
	7,600,11,25
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
JP Morgan Chase Glbl Snr Nts, 4.4%	Merrill Lynch SR Glbl Mtn 6.4%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Banks	Banks-Corp Bonds
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	X \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT ☐ Stock	NATURE OF INVESTMENT ☐ Stock 図 Other Corporate Bonds
(Describe)	(Describe)
☐ Partnership ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Schedule C)	Partnership
Thousand the service of the first of deficition of the service of	Thousand Nederland of Good of More (Report of Scriedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
06 / 28 / 16 /	/
ACQUIRED DISPOSED	ACQUIRED DISPOSED
	l •

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Morgan Atanley Frn, 2.281%	Teva Pharmaceutical-ADR
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Banks-Corp Bonds	Health Care
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	X \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT Stock X Other Corporate Bonds (Describe)	NATURE OF INVESTMENT X Stock Other (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:
<u>10 / 27 / 16</u> / / /	05 / 09 / 16
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Delphi Corp SR Notes 5%	Activis Funding SCS (Allergan) 2.35%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Industrial	Industrial
FAIR MARKET VALUE	FAIR MARKET VALUE
	\$2,000 - \$10,000 X \$10,001 - \$100,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT Stock X Other Corporate Bonds	NATURE OF INVESTMENT Stock X Other Corporate Bonds
Stock X Other Corporate Bonds (Describe)	Stock X Other Corporate Bonds (Describe)
Partnership O Income Received of \$0 - \$499	Partnership O Income Received of \$0 - \$499
○ Income Received of \$500 or More (Report on Schedule C)	○ Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
04 / 21 / 16 09 / 30 / 16	_12 / 09 / 16/
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
FAID MADVET VALUE	FAID MADI/ET VALUE
FAIR MARKET VALUE \$2,000 - \$10,000 \$10,001 - \$100,000	FAIR MARKET VALUE \$2,000 - \$10,000 \$10,001 - \$100,000
\$100,001 - \$1,000,000 Str,000,000	\$100,001 - \$100,000 S10,000 Over \$1,000,000
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock Other	Stock Other(Describe)
Partnership () Income Received of \$0 - \$499	Partnership () Income Received of \$0 - \$499
○ Income Received of \$500 or More (Report on Schedule C)	○ Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
ACQUIRED DISPOSED	ACQUIRED DISPOSED
·	

Comments:_

SCHEDULE A-2 Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 7	
Name	
Whalen, James E	

► 1. BUSINESS ENTITY OR TRUST	► 1. BUSINESS ENTITY OR TRUST
East County Renewable Coalition	J. Whalen Associates, Inc.
Name	Name
San Diego, CA 92108-2820	San Diego, CA 92108-2820
Address (Business Address Acceptable)	Address (Business Address Acceptable)
Check one ☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2	Check one ☐ Trust, go to 2 ☒ Business Entity, complete the box, then go to 2
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Advocacy Group	Real Estate Development Consulting
FAIR MARKET VALUE IF APPLICABLE, LIST DATE:	FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
\$0 - \$1,999	\$0 - \$1,999
X \$2,000 - \$10,000	\$2,000 - \$10,000
\$100,001 - \$1,000,000	X \$100,001 - \$1,000,000
Over \$1,000,000	Over \$1,000,000 NATURE OF NATURAL Corporate
NATURE OF INVESTMENT Partnership X Sole Proprietorship Other	NATURE OF INVESTMENT Shareholder Partnership Sole Proprietorship X Other
YOUR BUSINESS POSITION Executive Director	YOUR BUSINESS POSITION Director, President
▶ 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 ENTITY/TRUST)
X \$0 - \$499	\$10,001 - \$100,000
□ \$500 - \$1,000 □ OVER \$100,000	\$500 - \$1,000 X OVER \$100,000
☐ \$1,001 - \$10,000	
➤ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)	■ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)
X None or Names listed below	☐ None or ☒ Names listed below Baldwin & Sons
	Brian & Gayl Hynek
	Gildred Companies
► 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 one box:	Check one box:
☐ INVESTMENT ☐ REAL PROPERTY	I INVESTMENT X REAL PROPERTY
Name of Business Entity, if Investment, or	Name of Business Entity, if Investment, or
Assessor's Parcel Number or Street Address of Real Property	Assessor's Parcel Number or Street Address of Real Property
	Consulting
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	X \$10,001 - \$100,000
Over \$1,000,000	Situo,001 - \$1,000,000 ACCOINCE BISI COLD
NATURE OF INTEREST	NATURE OF INTEREST
Property Ownership/Deed of Trust Stock Partnership	Property Ownership/Deed of Trust Stock Partnership
Leasehold Other	Leasehold X Other Additional Office
Check box if additional schedules reporting investments or real property are attached	Check box if additional schedules reporting investments or real property are attached

Additional Single Sources of Income of \$10,000 or more for J. Whalen Associates, Inc.

Hamann Companies
HomeFed Fanita Rancho, LLC
HomeFed Otay Land 11, LLC
Ikon, Ltd.
Otay Lakes LP
Otay Land Company, LLC
Richard Sager
SDG&E
Indie Law Group, APC
California Wildlife Foundation
Elliot Megdal & Associates
GDCI Proctor Valley, LP
Good Earth Plant Company
Newland Group, Inc

SCHEDULE C Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Whalen, James E

1. INCOME RECEIVED	► 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME	NAME OF SOURCE OF INCOME
J. Whalen Associates, Inc.	
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
San Diego, CA 92108-2820	
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE
Real Estate Development Consulting	
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
Director, President	
GROSS INCOME RECEIVED No Income - Business Position Only	GROSS INCOME RECEIVED No Income - Business Position Or
\$500 - \$1,000 \$1,001 - \$10,000	\$500 - \$1,000
\$10,001 - \$100,000 X OVER \$100,000	S10,001 - \$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 (For self-employed use Schedule A-2.)
Partnership (Less than 10% ownership. For 10% or greater use	Partnership (Less than 10% ownership. For 10% or greater use
Schedule A-2.) Sale of	Schedule A-2.) Sale of
(Real property, car, boat, etc.)	(Real property, car, boat, etc.)
Loan repayment	Loan repayment
Commission or Rental Income, list each source of \$10,000 or more	Commission or Rental Income, list each source of \$10,000 or more
(Describe)	(Describe)
Other	Other
(Describe)	Other
(2000/180)	(Describe)
2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PE .	,
You are not required to report loans from commercial retail installment or credit card transaction, made in the	ending institutions, or any indebtedness created as part of a e lender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's
*You are not required to report loans from commercial retail installment or credit card transaction, made in the members of the public without regard to your official states.	ending institutions, or any indebtedness created as part of a e lender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's
* You are not required to report loans from commercial retail installment or credit card transaction, made in the members of the public without regard to your official segular course of business must be disclosed as follows:	ending institutions, or any indebtedness created as part of a e lender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs:
* You are not required to report loans from commercial retail installment or credit card transaction, made in the members of the public without regard to your official segular course of business must be disclosed as follows:	ending institutions, or any indebtedness created as part of a elender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs: INTEREST RATE None None
* You are not required to report loans from commercial retail installment or credit card transaction, made in th members of the public without regard to your official s regular course of business must be disclosed as follow	ending institutions, or any indebtedness created as part of a e lender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs: INTEREST RATE None SECURITY FOR LOAN
* You are not required to report loans from commercial retail installment or credit card transaction, made in the members of the public without regard to your official stregular course of business must be disclosed as follow NAME OF LENDER* ADDRESS (Business Address Acceptable)	ending institutions, or any indebtedness created as part of a le lender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs: INTEREST RATE None None
* You are not required to report loans from commercial retail installment or credit card transaction, made in th members of the public without regard to your official s regular course of business must be disclosed as follow	ending institutions, or any indebtedness created as part of a e lender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs: INTEREST RATE None SECURITY FOR LOAN
* You are not required to report loans from commercial retail installment or credit card transaction, made in the members of the public without regard to your official stregular course of business must be disclosed as follow NAME OF LENDER* ADDRESS (Business Address Acceptable)	ending institutions, or any indebtedness created as part of a elender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs: INTEREST RATE None SECURITY FOR LOAN None Real Property
* You are not required to report loans from commercial retail installment or credit card transaction, made in the members of the public without regard to your official sergular course of business must be disclosed as follow NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER	ending institutions, or any indebtedness created as part of a elender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs: INTEREST RATE None SECURITY FOR LOAN None Real Property
* You are not required to report loans from commercial retail installment or credit card transaction, made in the members of the public without regard to your official stregular course of business must be disclosed as follow NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER HIGHEST BALANCE DURING REPORTING PERIOD	ending institutions, or any indebtedness created as part of a le lender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs: INTEREST RATE Whone SECURITY FOR LOAN None Personal residence Real Property Street address City
* You are not required to report loans from commercial retail installment or credit card transaction, made in the members of the public without regard to your official sergular course of business must be disclosed as follow NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER HIGHEST BALANCE DURING REPORTING PERIOD \$500 - \$1,000	rending institutions, or any indebtedness created as part of a selender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs: INTEREST RATE Whone SECURITY FOR LOAN None Personal residence Real Property Street address
* You are not required to report loans from commercial retail installment or credit card transaction, made in the members of the public without regard to your official stregular course of business must be disclosed as follow NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER HIGHEST BALANCE DURING REPORTING PERIOD \$500 - \$1,000	rending institutions, or any indebtedness created as part of a selender's regular course of business on terms available to tatus. Personal loans and loans received not in a lender's vs: INTEREST RATE Whone SECURITY FOR LOAN None Personal residence Real Property Street address City