

STATEMENT OF ECONOMIC INTERESTS COVER PAGE

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> E-Filed: 3/24/2022 09:01:58 Filing ID:

Please type or print in ink.			300053144
NAME OF FILER (LAST)	(FIRST)	(MIDDLE)	
Whalen, James E			
1. Office, Agency, or Court			
Agency Name (Do not use acronyms)			
City of San Diego			
Division, Board, Department, District, if a	pplicable	Your Position	
Planning Commission		Commissioner	
► If filing for multiple positions, list below	v or on an attachment. (Do not u	se acronyms)	
Agency:		Position:	
2. Jurisdiction of Office (Check a	t least one box)		
State		Judge, Retired Judge, Pro Tem Judge, or Cot (Statewide Jurisdiction)	urt Commissioner
Multi-County		County of	
X City of _San Diego		Other	
3. Type of Statement (Check at lea	ast one box)		
X Annual: The period covered is Jan December 31, 2021.	,	Leaving Office: Date Left/	
-or- The period covered is December 31, 2021.		☐ The period covered is January 1, 2021, t leaving office.	through the date of
Assuming Office: Date assumed		The period covered is// the date of leaving office.	, through
Candidate: Date of Election	and office sough	nt, if different than Part 1:	
4. Schedule Summary (must co	omplete) ► Total numbe	er of pages including this cover page: 12	
Schedules attached			
X Schedule A-1 - Investments – so	hedule attached	Schedule C - Income, Loans, & Business Positions -	- schedule attached
Schedule A-2 - Investments – sc	hedule attached	Schedule D - Income - Gifts - schedule attached	
Schedule B - Real Property - so	hedule attached	Schedule E - Income – Gifts – Travel Payments – so	chedule attached
N			
-or- None - No reportable inte	erests on any schedule		
5. Verification MAILING ADDRESS STREET	CITY	STATE ZIP	P CODE
(Business or Agency Address Recommended - Publ		SIAIL ZIF	CODE
San Diego, CA, 92107			
DAYTIME TELEPHONE NUMBER		EMAIL ADDRESS	
()			
I have used all reasonable diligence in pr herein and in any attached schedules is		iewed this statement and to the best of my knowledge the e this is a public document.	information contained
I certify under penalty of perjury unde	r the laws of the State of Califo	ornia that the foregoing is true and correct.	
Date Signed 03/24/2022		Signature James Whalen	
(month, day, year		(File the originally signed paper statement with your	filing official.)

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			
Whalen,	James	E	

•	NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
	Chevron Corp	Phillips 66
	GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
	Energy	Energy
	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
	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 ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Schedule C)
	IE ADDITIONE E LIST DATE.	IE ADDITIONE ELICT DATE.
	IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
	07 / 21 / 21 / / 21 ACQUIRED DISPOSED	07 / 21 / 21 // / 21 ACQUIRED // / 21 DISPOSED
-	NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
	Tutamatianal Roman Ga	Alberia Garan Tan
	International Paper Co GENERAL DESCRIPTION OF THIS BUSINESS	Altria Group Inc GENERAL DESCRIPTION OF THIS BUSINESS
	Materials	Consumer Staples
	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	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 ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Schedule C)
	IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
	IF AFFLICABLE, LIST DATE.	IF AFFEIGABLE, LIST DATE.
		/ <u>/21</u> / <u>/21</u>
	ACQUIRED DISPOSED	ACQUIRED DISPOSED
•	NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
	Philip Morris Intl Inc	Johnson & Johnson
	GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
	Consumer Staples	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	S100,001 - \$1,000,000 Over \$1,000,000
	NATURE OF INVESTMENT	NATURE OF INVESTMENT
	X Stock Other (Describe)	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:
	/ / 21 / / 21	/ /21 / /21
	ACQUIRED DISPOSED	ACQUIRED DISPOSED
	· ·	I
C	omments:	
_,		

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

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFO	RNIA	FORM	700
FAIR POLI	TICAL PR	ACTICES	COMMISSION
Name			
Whalen,	James	E	

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Travelors Cos Ins	Ciago Systems Inc
Travelers Cos Inc GENERAL DESCRIPTION OF THIS BUSINESS	Cisco Systems Inc GENERAL DESCRIPTION OF THIS BUSINESS
Financials	Information Technology
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000 S10,001 - \$100,000	∑ \$2,000 - \$10,000
S100,001 - \$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) 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:
/ /21 / /21	01 /14 / 21 / / 21
ACQUIRED DISPOSED	ACQUIRED DISPOSED
	► NAME OF BUSINESS ENTITY
► NAME OF BUSINESS ENTITY	NAME OF BUSINESS ENTITY
Qualcomm Inc	Verizon Communications GENERAL DESCRIPTION OF THIS BUSINESS
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Information Technology	Telecommunications Services
FAIR MARKET VALUE X \$2,000 - \$10,000	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
X Stock Other (Describe)	∑ 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:
/ /21 / /21	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
	710 (01)(2)
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
JPMorgan Chase & Co	Bristol-Myers Squibb Co
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
02.12.00.2 02.00.11.11.00.0 07.11.11.0 00.01.11.200	
Financials	Health Care
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000 \$10,001 - \$100,000	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	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 Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/ / 21 01 / 12 / 21	05 / 07 / 21 / / 21
ACQUIRED DISPOSED	ACQUIRED DISPOSED
'	1

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

Investments must be itemized.

Do not attach brokerage or financial statements.

			700 COMMISSION
Name			
Whalen,	James	E	

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Walgreen Boots Alliance Inc.	Morgan Stanley
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Congumer Stanles	Einongiala
Consumer Staples FAIR MARKET VALUE	Financials FAIR MARKET VALUE
X \$2,000 - \$10,000	
\$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)	(Describe)
☐ 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)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
//21//21	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Bank of America FXD/FLT C04/22 2.881%	JD Morgan Chaga CRI, EVD To FIT 2 5509
GENERAL DESCRIPTION OF THIS BUSINESS	JP Morgan Chase GBL FXD-To-FLT 3.559% GENERAL DESCRIPTION OF THIS BUSINESS
Banks	Banks
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000 \$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 Stock Other Corporate Bonds	NATURE OF INVESTMENT Stock W Other Corporate Bonds
Stock X Other Corporate Bonds (Describe)	Stock X Other Corporate Bolids (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:
//21/21	<u> </u>
ACQUIRED DISPOSED	ACQUIRED DISPOSED
	<u> </u>
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Morgan Stanley MWC@+15BP 3.737%	Goldman Sachs Inc SR GLBL FRN 3.61800%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Banks	Banks
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000 \$10,001 - \$100,000	X \$2,000 - \$10,000
\$100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock X Other Corporate Bonds	Stock X Other Corporate Bonds
(Describe)	(Describe)
☐ 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)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/ /21 / /21	/ /21 / /21
ACQUIRED DISPOSED	ACQUIRED DISPOSED
ACCOUNTED DIOI OCED	AOQUINED DISPOSED

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

Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
CVS Health Corporation	BB&T Corp
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Health care	Financials
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000 \$10,001 - \$100,000	X \$2,000 - \$10,000
\$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 (Describe)	X Stock Other (Describe)
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)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
/ /21 / /21	/ /21 / /21
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Hollyfrontier Corp Senior NTS 5.875% 04-01-2026 C01/26	Genuine Parts Co
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Corporate Bonds	Consumer Discretionary
FAIR MARKET VALUE	FAIR MARKET VALUE
\bar{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
Ψ100,001 - Ψ1,000,000	Ψ100,001 - Ψ1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock X Other Corporate Bonds	Stock Other(Describe)
(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:
// <u>21</u> // <u>21</u>	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Truist Financial Corporation	McDonald's Corp
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Financials	Consumer Discretionary
FAIR MARKET VALUE	FAIR MARKET VALUE
<u>X</u> \$2,000 - \$10,000 <u> </u>	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
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 Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
, ,21 , ,21	03 /11 /21 01 /20 /21
ACQUIRED DISPOSED	03 /11 /21 01 /20 /21 ACQUIRED DISPOSED
NO COLLEGE	NOQUINED DISPOSED

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

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM FAIR POLITICAL PRACTICES COI	
Name	

Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Bank of America Corp	Comcast Corp-CL A
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Financials	Communication Services
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000	\(\) \(\
\$100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Over \$1,000,000
\$1,000,001 - \$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	▼ Stock Other
(Describe)	(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:
IF AFFLICABLE, LIST DATE.	IF AFFLICABLE, LIST DATE.
<u>04 / 08 /21 </u>	<u>04 / 06 /21</u>
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Molla Fargo CD EVD/FIT Clbl	Dupont Do Nomoura Ina
Wells Fargo SR FXD/FLT Glbl GENERAL DESCRIPTION OF THIS BUSINESS	Dupont De Nemours Inc GENERAL DESCRIPTION OF THIS BUSINESS
GENERAL DESCRIPTION OF THIS BOSINESS	
Banks	Materials
FAIR MARKET VALUE	FAIR MARKET VALUE
	I I — —
X \$2,000 - \$10,000	
\$100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock X Other Bond	X Stock Other
(Describe)	(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:
05 <u>/</u> 26 / 21 / / 21	03 / 03 / 21 05 / 04 / 21
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
There are the true CL 3	Ciled Orienze Tun
Tyson Foods Inc-CL A	Gilead Sciences Inc
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Consumer Staples	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	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
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:
00 100 124 00 100 124	01 /04 /94 / /94
02 / 28 / 21	01 /24 / 21 // / 21
ACQUIRED DISPOSED	ACQUIRED DISPOSED

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

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFO	RNIA	FORM	700
FAIR POLI	TICAL PR	ACTICES	COMMISSION
Name			
Whalen,	James	E	

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Lincoln National Corp	OMNICOM GROUP
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Financials	Congumer Diggretionery
FAIR MARKET VALUE	Consumer Discretionary FAIR MARKET VALUE
X \$2,000 - \$10,000	\$2,000 - \$10,000 \times \$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 ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Sched	□ Partnership □ Income Received of \$0 - \$499 □ Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
07 / 08 / 21 / / 21	// 21 05/30/ 21
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Goldman Sachs Group SR MTN	Corning
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Banks	Information Technology
FAIR MARKET VALUE	FAIR MARKET VALUE
\$100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT _	NATURE OF INVESTMENT
Stock X Other Bond	X Stock Other
(Describe)	(Describe)
Partnership Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Sched	lule C) Partnership ☐ Income Received of \$0 - \$499 ☐ Income Received of \$500 or More (Report on Schedule C)
Income Received of \$500 of More (Report of Scried	income Received of \$500 of Note (Report of Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
10 / 25 / 21 // / 21	03 /11 / 21 // 21
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Booking Holdings Inc SR Glbl	Hewlett Packard Enterprise CO 4.45%
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Industrial	Technology
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000 \$10,001 - \$100,000	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	NATURE OF INVESTMENT
Stock X Other Bond	X Stock Other
(Describe)	(Describe)
Partnership Income Received of \$0 - \$499	Partnership Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Sched	ule C) Income Received of \$500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
<u>04 / 09 /21</u>	04 / 20 / 21 //
ACQUIRED DISPOSED	ACQUIRED DISPOSED

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	
Name	

Whalen, James E

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Sempra Energy	Evergy Inc
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Utilities	Utilities
FAIR MARKET VALUE	FAIR MARKET VALUE
	II
S100,001 - \$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 ☐ 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)
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
<u>06 / 11 /21//21</u>	08 / 13 / 21 07 / 20 / 21
ACQUIRED DISPOSED	ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Pure dans Grand Control Of Pr. 1777	Gittimum GD Water 0 5000
Broadcom Corp Senior GLBL NTS GENERAL DESCRIPTION OF THIS BUSINESS	Citigroup SR Notes 2.700% GENERAL DESCRIPTION OF THIS BUSINESS
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL BESONII HON OF THIS BOSINESS
Industrial	Banks
FAIR MARKET VALUE	FAIR MARKET VALUE
S100,001 - \$1,000,000 Over \$1,000,000	S100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock X Other Bond	Stock X Other Corporate Bonds
(Describe)	(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)
IE ADDITION ELLICT DATE.	IE ADDITION ELLICT DATE.
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
<u>11 / 10 /21</u>	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
NAME OF BURNESS FUTITY	NAME OF BUOINESS ENTITY
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Citigroup INC SR GLBL FRN	3M Company
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Banks	Industrials
FAIR MARKET VALUE	FAIR MARKET VALUE
X \$2,000 - \$10,000 \$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 X Other Bond	NATURE OF INVESTMENT
Stock X Other Bond (Describe)	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)
IE ADDITOADLE LIGT DATE.	IS ADDITIONAL FOR DATE.
IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
<u>11 / 09 /21 </u>	<u> 10 / 19 /21 </u>
ACQUIRED DISPOSED	ACQUIRED DISPOSED
	l I

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

Investments must be itemized.

Do not attach brokerage or financial statements.

			700 COMMISSION
Name			
Whalen,	James	E	

•	NAME OF BUSINESS ENTITY	▶	NAME OF BUSINESS ENTITY
	Lockheed Martin Corporation		AT&T
	GENERAL DESCRIPTION OF THIS BUSINESS		GENERAL DESCRIPTION OF THIS BUSINESS
	Industrials		Communication Services
	FAIR MARKET VALUE		FAIR MARKET VALUE
			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
	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 Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)
	IF APPLICABLE, LIST DATE:		IF APPLICABLE, LIST DATE:
	01 / 28 / 21 / / 21		01 / 20 / 21 // 21
	ACQUIRED DISPOSED		ACQUIRED DISPOSED
_	NAME OF BUSINESS ENTITY	-	NAME OF BUSINESS ENTITY
	NAME OF BUSINESS ENTITY	-	NAME OF BUSINESS ENTITY
	Mylan NV Global MWC@+35BP		Oracle Corp SR Global NTS GENERAL DESCRIPTION OF THIS BUSINESS
	GENERAL DESCRIPTION OF THIS BUSINESS		GENERAL DESCRIPTION OF THIS BUSINESS
	Industrial		Industrial
	FAIR MARKET VALUE		FAIR MARKET VALUE
	<u>X</u> \$2,000 - \$10,000 <u> </u>		<u>X</u> \$2,000 - \$10,000 <u>\$10,001 - \$100,000</u>
	\$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 Bond		Stock X Other Bond
	(Describe)		(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:
	02 (15 .04		02 (22 (04) 04 (21 (04
	03 / 15 /21 / 21		03 / 22 / 21 04 / 21 / 21
	ACQUIRED DISPOSED		ACQUIRED DISPOSED
>	NAME OF BUSINESS ENTITY	•	NAME OF BUSINESS ENTITY
	General Mills Incorporated		JP Morgan Chase & Co Note M/W CLBL 2.301%
	GENERAL DESCRIPTION OF THIS BUSINESS		GENERAL DESCRIPTION OF THIS BUSINESS
	GENERAL DESCRIPTION OF THIS BUSINESS		GENERAL DESCRIPTION OF THIS BUSINESS
	Consumer Discrectionary		Corporate Bonds
	FAIR MARKET VALUE		FAIR MARKET VALUE
	X \$2,000 - \$10,000 \$10,001 - \$100,000		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
	NIATURE OF INVESTMENT		NATURE OF INVESTMENT
	NATURE OF INVESTMENT X Stock Other		Stock X Other Bond
	(Describe)		(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:
	// 21 03_/_01_/ 21		04 / 06 /21 / /21
	ACQUIRED DISPOSED		ACQUIRED DISPOSED
	AOGOINED DIOI OGED	l	VOXOIVED DIOLOGED

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			
Whalen,	James	E	

► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Charles Schwab SR GLb NT GENERAL DESCRIPTION OF THIS BUSINESS	General Motors Co Notes M/W CLBL 6.125% GENERAL DESCRIPTION OF THIS BUSINESS
Finance FAIR MARKET VALUE X \$2,000 - \$10,000	Bond FAIR MARKET VALUE \$\overline{\times} \\$2,000 - \\$10,000
☐ Income Received of \$500 or More (Report on Schedule C) IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
03 / 16 / 21 04 / 06 / 21 ACQUIRED DISPOSED	04 /21 / 21 // 21 ACQUIRED DISPOSED
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
Abbvie Inc GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS BUSINESS
Health Care FAIR MARKET VALUE X \$2,000 - \$10,000	FAIR MARKET VALUE \$2,000 - \$10,000 \$10,001 - \$100,000 \$100,001 - \$1,000,000 Over \$1,000,000 NATURE OF INVESTMENT
X Stock Other (Describe) □ Partnership □ Income Received of \$0 - \$499 □ Income Received of \$500 or More (Report on Schedule C)	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:
05 / 07 / 21 / / 21 ACQUIRED DISPOSED	// 21
► NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
GENERAL DESCRIPTION OF THIS BUSINESS	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	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	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:	☐ Income Received of \$500 or More (Report on Schedule C) IF APPLICABLE, LIST DATE:
//21	
Comments:	

SCHEDULE A-2

Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

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

► 1. BUSINESS ENTITY OR TRUST	► 1. BUSINESS ENTITY OR TRUST
J. Whalen Associates, Inc.	
Name 2851 Camino Del Rio South, San Diego, CA, 92108-2820	Name
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
Real Estate Development Consulting	
FAIR MARKET VALUE IF APPLICABLE, LIST DATE:	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$0 - \$1,999 \$2,000 - \$10,000 \$10,001 - \$100,000 \$100,001 - \$1,000,000 Over \$1,000,000
NATURE OF INVESTMENT Corporate Shareholder Partnership Sole Proprietorship X Other	NATURE OF INVESTMENT Partnership Sole Proprietorship Other
YOUR BUSINESS POSITION <u>Director</u> , <u>President</u>	YOUR BUSINESS POSITION
► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)	➤ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME <u>TO</u> THE ENTITY/TRUST)
□ \$0 - \$499 □ \$10,001 - \$100,000 □ \$500 - \$1,000 ☑ OVER \$100,000	\$0 - \$499 \$10,001 - \$100,000 \$500 - \$1,000 OVER \$100,000
➤ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.) None or X Names listed below See Attachment 1.	➤ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.) None or Names listed below
► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST Check one box:	➤ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST Check one box:
☐ INVESTMENT X REAL PROPERTY	☐ INVESTMENT ☐ REAL PROPERTY
APN: 448-661-16-00, 2851 Camino Del Rio South Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property	Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property
San Diego, CA 92108 Description of Business Activity or City or Other Precise Location of Real Property	Description of Business Activity <u>or</u> City or Other Precise Location of Real Property
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 \$10,001 - \$1,000,000 ACQUIRED DISPOSED Over \$1,000,000	FAIR MARKET VALUE IF APPLICABLE, LIST DATE: \$2,000 - \$10,000 \$10,001 - \$100,000 \$100,001 - \$1,000,000 ACQUIRED DISPOSED Over \$1,000,000
NATURE OF INTEREST Property Ownership/Deed of Trust Stock Partnership	NATURE OF INTEREST Property Ownership/Deed of Trust Stock Partnership
Leasehold Other	Leasehold Other
Check box if additional schedules reporting investments or real property are attached	Check box if additional schedules reporting investments or real property are attached
Commenter	

Attachments: Schedule A-2

Attachment 1

Gayl Hynek, Hamann Companies, HomeFed Fanita Rancho, LLC, Sager-Escondido Annexation, SDG&E;, Indie Law Group, APC, GDCI Proctor Valley, LP, Clean Focus Renewables Inc, Haagen-Empire Ranch, Pacific Hospitality Group, Vitol, 18 Le Conte Project, Candlelight Project, Barcelona 91, LLC, The Preserve at Torrey Highlands, LLC, Abrams Trust, Jabro Law Group, APC, Rincon Group, SLF-Moss Street, LLC, Hunter Equestrian Center