

## **APPENDIX B**

### **DISCLOSURE CATEGORIES**

(Amended by the Board of Trustees on *Insert Date*, 2013)

<u>Category 1.</u>	Designated Employees in this category shall disclose, as required by Government Code sections 87206 and 87207 and this Code sections 6 and 7, all reportable investments, business positions in business entities, interests in real property, and sources of income including gifts, loans, and other payments.

Designated Employees in the following categories shall disclose, as required by Government Code sections 87206 and 87207 and the State Bar's Conflict of Interest Code, all reportable investments in, business positions held in, and sources of income including gifts, loans, and other payments received from sources described below:

<u>Category 2.</u>	Sources that are subject to the regulatory, permit or licensing authority of the State Bar of California or have an application for a license, permit or other certification pending before the State Bar of California
<u>Category 3.</u>	Vendors of office supplies, office equipment, office furniture or business maintenance supplies or services, typesetting, printing or duplicating services or equipment, messenger services, mass mailing services or security services.
<u>Category 4.</u>	Accredited and unaccredited law schools, admissions related consultants and sources that provide education, training or education and training products used to qualify for or maintain a license to practice law in California including providers of continuing legal education, legal publications, and online legal research.
<u>Category 5.</u>	Travel agencies, hotels, meeting planning services, airlines, car rental agencies, ground transport entities, vendors of meeting space, food services, and entertainment.
<u>Category 6.</u>	Insurance companies, brokerage firms, carriers, holding companies, underwriters, brokers, solicitors, agents, adjusters, claims managers, actuaries, and third-party administrators.
<u>Category 7.</u>	Banks and other financial institutions.

<u>Category 8.</u>	Vendors of computers, computer hardware, maintenance, software, data processing, web hosting, web design, computer consulting services, video or telecom supplies, services, consulting or equipment and providers of audio-visual production services.
<u>Category 9.</u>	Employee benefit providers and administrators of employee benefits, personnel consulting services and employment agencies.
<u>Category 10.</u>	Real estate brokerage firms, real estate agents, real estate brokers and companies that engage in property management, land development, construction or the acquisition or sale or leasing or subleasing of real property.
<u>Category 11.</u>	Providers of consulting, rehabilitative, educational treatment or other services concerning the prevention, treatment or rehabilitation of persons suffering from chemical dependency.
<u>Category 12.</u>	Public relations and / or media management consultants.
<u>Category 13.</u>	Designated Employees in this category shall be required to disclose financial interests on their Statement of Economic Interests if during a reporting period, a Designated Employee in this category has been required to make a disclosure under the provisions of Business and Professions Code section 6036, he or she shall disclose the disqualifying interest on a Statement of Economic Interests.
<u>Category 14.</u>	The disclosure category for Designated Employees in this category shall be determined by the Executive Director in consultation with the Board of Governors.