

APOC Financial Disclosure

Appointment to a state board or commission may qualify you as a public official. By law, the legislature requires public officials to disclose financial information in order to inform the public of any potential conflicts of interest that may arise due to actions of the board or commission to which you are appointed. (Please see the final page of this document (“Boards & Commissions—APOC List”) for a list of those boards and commissions whose members are required to file these disclosures.

The Public Official Financial Disclosure (POFD) is due within 30 days after taking office as a public official. Annual POFDs are due by March 15, and cover any financial activity from the prior calendar year. Final POFDs are due within 90 days after leaving office as a public official.

For Alaska state boards and commissions members requiring financial disclosure, you will be asked to disclose the following information regarding income sources and business interests. As a board member, your POFD form will not be online and searchable to the public. A copy of the submitted document can be requested on an individual basis through APOC.

When disclosing income, you will be asked to make one of the following selections. Please note, this option applies to income disclosures that say **“choose/income option”**:

More than \$250 and no more than \$1,000, for gifts only
More than \$1,000 and no more than \$2,000
More than \$2,000 and no more than \$5,000
More than \$5,000 and no more than \$10,000
More than \$10,000 and no more than \$20,000
More than \$20,000 and no more than \$50,000
More than \$100,000 and no more than \$200,000
More than \$200,000 and no more than \$500,000
More than \$500,000 and no more than \$1,000,000
More than \$1,000,000

Salaried Employment- Choose/income option

- Income means anything of value and covers all forms of compensation or benefits received from an employer; compensation or benefits include wages, salary, commissions, tips, bonuses, housing, use of an automobile and deferred compensation.
- Report each employer who paid you, your spouse, domestic partner or children covered by reporting requirements more than \$1,000.
- Include amount of income, dates of employment, terms of employment, amount of time worked. Describe the work performed in sufficient detail to make it clear to a person of ordinary understanding.

Self Employed income- Choose/income option

- List each source of self-employment income over \$1000 by name and amount. Income means anything of value and covers all forms of compensation, including deferred income and attorney contingency fees

- Disclose each client, customer or business that paid you, your spouse/domestic partner or child more than \$1,000. Self-employment includes sole proprietors, partnerships, limited liability companies, professional corporations.

Rental Income- Choose/income option

- If any person paid more than \$1000 in rent during the preceding calendar year, report the name of the person and the amount of the rent paid, and, if the property is managed by a person other than the filer or a family member of the filer, additionally report the manager's name.

Dividends, Interest & Other Business/Investment Distributions of Earnings-

Choose/income option

- Please remember to add your PFDs to this section if applicable.
- Disclose source and amount of income over \$1000 received from dividends, interest and other distributions of earnings from a business or investment
- Include dividends or interest received from bank accounts, capital gains, money market accounts, certificates of deposit, Native corporation dividends, Permanent Fund dividends
- Note: This section refers only to amounts received during the reporting period; there is a separate section for disclosing business interest information.

Other Income – Choose/income option

- List source and amount of income over \$1,000 not listed elsewhere in this form, including sale of goods or property, taxable capital gains, pensions, retirement account cash-outs, government entitlements, alimony or child support payments, honoraria and any other payments not otherwise accounted for.

Gifts worth More than \$250

- Report all gifts worth more than \$250 (including gifts from a single source with a cumulative value of more than \$250). Include travel expenses, discounts not available to the public, loans forgiven or loans paid by a third party. Do not report gifts from spouse, domestic partner, parent, dependent child, sibling, grandparent, aunt, uncle, niece or nephew.

Business Interests

- Report business interests even if they were NOT a source of income, including businesses in which the filer or family member (spouse, domestic partner, dependent children and for legislative branch filers ONLY – nondependent children living with the filer):
 - Served as stockholder, owner, officer, director, partner, proprietor, employee or held an interest.
 - Had ownership interests of more than \$1,000 in a publicly traded corporation.
 - Had any other ownership interest in a business, including shares in non-publicly traded corporations, sole proprietorships, and limited liability companies. Include options to buy.
 - Include non-profit organizations, corporations, businesses, associations, trade groups.

Real Property Interests

- Report an interest in real property by the address or other legal description of the property, except that a primary residence or recreational property held for personal use may be described only by zip code.
- Report the nature of the interest that the filer or family member held in the property; the nature of interests to be reported includes fee simple ownership, tenancy in common, general or limited partnership interest, and holder of an option to purchase.

Trusts, Retirement Accounts or Other Beneficial Interests

- Report each trust, retirement account or other beneficial interest that exceeded \$1,000 during the reporting period, including a state or federally administered retirement system plan, employee pension plans, profit-sharing trusts, family trust, education trusts, deferred compensation plans, annuity plans or any other similar arrangement intended to provide future income the filer or family member.
- Identify individual investments accounts if you or family members manage or personally control the investments.

Loans, Loan Guarantees & Debts over \$1,000

- Report each creditor or lender to whom more than \$1,000 was owed during the reporting period.
- Report guarantor of each loan.
- List financial obligations, including mortgages on property owned or sold during the reporting period; loans that have been guaranteed; delinquent taxes; alimony; child support payments; medical bills; boat and vehicle loans; business and personal loans; escrows; student loans; signature loans and promissory notes.
- Loans include secured, unsecured and contingent loans.
- Do NOT list credit card obligations or revolving charge accounts.

Government Contracts & Offers to Contract

- List all contracts, bids and offers to contract with the state or any state or municipal agency or entity.
- Report contract interests as individual, sole proprietor, family member, partnership, professional corporation, Limited Liability Company or through a corporation in which filer or family members held a controlling interest.

Natural Resource Leases

- List natural resource leases – including mineral, timber, oil and gas leases – held, bid or offered during the reporting period.
- Report lease interests as individual, sole proprietor, family member, partnership, professional corporation, Limited Liability Company; or corporation in which you or family (individually or together) held controlling interest.

Boards & Commissions—APOC List

ALASKA AEROSPACE CORPORATION
BOARD OF AGRICULTURE AND CONSERVATION
ALASKA ENERGY AUTHORITY
ALASKA RETIREMENT MANAGEMENT BOARD
ALCOHOLIC BEVERAGE CONTROL BOARD
ALASKA STATE COUNCIL ON THE ARTS
STATE ASSESSMENT REVIEW BOARD
BIG GAME COMMERCIAL SERVICES BOARD
ALASKA PUBLIC BROADCASTING COMMISSION
COMMERCIAL FISHERIES ENTRY COMMISSION
COUNCIL ON DOMESTIC VIOLENCE AND SEXUAL ASSAULT
BOARD OF EDUCATION AND EARLY DEVELOPMENT
BOARD OF FISHERIES
FISHERMEN'S FUND ADVISORY AND APPEALS COUNCIL
BOARD OF GAME
ALASKA HOUSING FINANCE CORPORATION
STATE COMMISSION ON HUMAN RIGHTS
ALASKA INDUSTRIAL DEVELOPMENT AND EXPORT AUTHORITY
COMMISSION JUDICIAL CONDUCT
ALASKA JUDICIAL COUNCIL
KNIK ARM BRIDGE AND TOLL AUTHORITY
ALASKA LABOR RELATIONS AGENCY
LOCAL BOUNDARY COMMISSION
ALASKA MENTAL HEALTH TRUST AUTHORITY
ALASKA MUNICIPAL BOND BANK
OCCUPATIONAL SAFETY AND HEALTH REVIEW BOARD
ALASKA OIL AND GAS CONSERVATION COMMISSION
STATE BOARD OF PAROLE
ALASKA PERMANENT FUND CORPORATION
PERSONNEL BOARD
ALASKA COMMISSION ON POSTSECONDARY EDUCATION
ALASKA PUBLIC OFFICES COMMISSION
ALASKA RAILROAD CORPORATION
REGULATORY COMMISSION OF ALASKA
ALASKA ROYALTY OIL AND GAS DEVELOPMENT BOARD
ALASKA SEAFOOD MARKETING INSTITUTE
UNIVERSITY OF ALASKA BOARD OF REGENTS
ALASKA WORKERS' COMPENSATION BOARD
ALASKA WORKFORCE INVESTMENT BOARD