

## **APPENDIX B**

### **DISCLOSURE CATEGORIES**

(Approved by the Board of Governors on January 9, 2010, last amended on January 10, 2009)

Category 1. 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.

Designated Employees in this category 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 received from the following business entities or individuals:

Category 2. Vendors of typesetting, printing or duplicating services or equipment, and vendors of messenger services.

Category 3. Accredited and unaccredited law schools, admissions related consultants.

Category 4. Vendors of meeting space, food services, and entertainment.

Category 5. Insurance companies, insurance brokerage firms, carriers, holding companies, underwriters, brokers, solicitors, agents, adjusters, claims managers, actuaries, and third-party administrators.

Category 6. Banks and other financial institutions.

Category 7. Vendors of computers, computer hardware, computer maintenance, software, data processing, web hosting, web design, and computer consulting services.

Category 8. Employee benefit providers and administrators of employee benefits, personnel consulting services and employment agencies.

Category 9. Court reporting services.

Category 10. Vendors of office supplies, office equipment, office furniture or building maintenance supplies or services, video or telecom supplies, services, or equipment, and moving and storage services.

Category 11. Travel agencies, hotels, meeting planning services, airlines, car rental agencies and ground transport.

Category 12. Providers of voting and election related services.

- Category 13. Security services.
- Category 14. Mass mailing services.
- Category 15. 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.
- Category 16. Providers of treatment or services related to chemical dependency.
- Category 17. Providers of continuing legal education, legal publications, online legal research.
- Category 18. Providers of audio-visual production services.
- Category 19. Public relations and / or media management consultants.
- Category 20. Designated Employees in this category shall only be required to disclose financial interests on their Statement of Economic Interests under the following circumstances: 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.
- Category 30. The disclosure category for Designated Employees in this category shall be determined by the Executive Director in consultation with the Board of Governors.