

**OFFICE OF CHIEF FINANCIAL OFFICER  
CONFLICT OF INTEREST CODE**

**APPENDIX A  
DESIGNATED POSITIONS, DUTIES AND CATEGORIES**

<b>POSITION</b>	<b>DUTIES</b>	<b>CATEGORY</b>
Chief Financial Officer	Oversees all aspects of municipal finances including preparation of the annual budget, management of debt and investments, financial reporting, risk management; oversees information technology, compliance, and performance and analytics.	Files Form 700 (Statutory Requirement, Govt. Code section 87200)
Consultants/New Positions	<p>Consultants and new positions shall be included in the list of designated employees and shall disclose pursuant to the broadest disclosure category in Appendix B of the code subject to the following limitation:</p> <p>The Chief Financial Officer may determine in writing that a particular consultant or new position, although a “designated position,” is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with the disclosure requirements in this section. The Chief Financial Officer’s written determination shall include a description of the consultant’s or new position’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Chief Financial Officer’s determination is a public record and shall be retained for public inspection in the same manner and location as this Conflict of Interest Code.</p>	2

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**APPENDIX B  
DISCLOSURE CATEGORIES**

**CATEGORY 1:**

- a. All reportable investments and business positions in any firm or business entity that supplies goods or services to the City of San Diego, or is granted authority by the City of San Diego to use City facilities.
- b. All reportable investments, business positions, and income from sources located in or doing business in the City of San Diego.
- c. All reportable interests in real property located in the City of San Diego, including property located within a two-mile radius of any property owned or used by the City.
- d. All reportable interests in real property owned or used by any person or business entity that supplies goods or services to the City of San Diego, that is a tenant of the City of San Diego, or is granted authority by the City of San Diego to use City facilities.
- e. All reportable income, including gifts, from any person or business entity that supplies goods or services to the City of San Diego, that is a tenant of the City of San Diego, or is granted authority by the City of San Diego to use City facilities.

**CATEGORY 2:**

Consultants and new positions shall be included in the list of designated employees and disclose pursuant to the broadest category code subject to the following limitation:

The Chief Financial Officer may determine in writing that a particular consultant or new position, although a “designated position,” is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with the disclosure requirements described in this section. Such written determination shall include a description of the consultant’s or new position’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Chief Financial Officer’s determination is a public record and shall be retained for public inspection in the same manner and location as this conflict of interest code.