

Quick Filing Guide

Where to report information on the Annual Statement of Financial Disclosure. Numbers refer to the question on the form. Unless otherwise indicated, do not report holdings unless they are in excess of \$1,000. (NR indicates items that are Not Reported.)

401K, 403(b) and 457 plans	11,16	Home — See Residence	Rental income.	13
Accounts receivable.	18	Home purchase, improvement loans from financial institution.	Rental property.	17
Alimony/maintenance.	NR	Home purchase, improvement loans from other than a financial institution.	Residence, primary or secondary.	NR
Annuities.	11,16	Honorary positions, not compensated.	Retirement plans other than State or City of New York.	11,16
Assignments of income other than to a relative	15	Honoraria.	Retirement plan payments, if reportable for federal income tax purposes.	13
Automatically reinvested interest or dividends.	13	Income, generally.	Salary, other than for UCS position reported in 2a.	13
Bank and bond interest.	13	Inheritances.	Savings accounts.	NR
Bonds.	16	Insurance death benefits.	Savings bonds.	16
Business income.	13	Interest received from banks and bonds.	Securities.	16
Buy out agreements.	12(b),13	Investments other than securities or real property.	Severance agreement.	12(b)
Capital gains.	13	Investments, real property.	Severance payment.	13
Car loans from a financial institution.	NR	Investments, securities.	Social Security benefits.	NR
Certificates of deposit.	16	IRAs.	Spouse's income.	13
Child support.	NR	Keogh plans.	Spouse, name.	3(a)
Children under 18, not married.	3(b)	Lecture fees.	Stocks.	16
Compensation for injury/sickness.	NR	Liabilities over \$5,000.	Stock Options.	16
Compensation owed from prior or current employment.	14	Life Insurance.	Student Loans.	NR
Condominiums, cooperatives.	17	Marital status.	Teaching income.	13
Consulting fees.	13	Money market acct.	Time share, rented.	17
Contracts with government agencies.	6	Mortgage, not on primary or secondary residence.	Time share, not rented.	NR
Credit card debt in excess of \$5,000.	19	Mortgage on primary and secondary residence.	Tort recoveries.	NR
Debts owed to you.	18	Mortgage you hold.	Travel reimbursement paid by source other than UCS.	10
Debts you owe to others, in excess of \$5,000.	19	Mortgage spouse holds.	Treasury notes.	16
Deferred compensation plans.	11,16	Mutual funds.	Trusts.	11,16
Directorships.	4,13	NYS College Savings.	Trusts, family.	NR
Dividends.	13	Notes (investments).	Trust income.	13
Employment, after leaving UCS.	12(a)	Partnerships, limited.	Trusteeships.	4,13
Employment, other than listed in 2a.	5	Partnerships, general.	Unemployment Insurance.	NR
Employment, UCS.	2	Pensions.	Uniform Gift to Minors.	NR
Estates.	11	Political party committees and offices.	Vacation home, rented.	17
Gifts from relatives	NR	Professional practice.	Vacation home, not rented.	NR
Gifts not from relatives.9		Private practice Income.	Veteran's benefits.	NR
Gov't disability benefits.	NR	Prize of Personal Property Report Fair Market Value.	Warrants.	16
		Prize of Cash, Report Value.	Workers compensation.	NR
		Profit sharing.	Zero coupon bonds.	16
		Public Assistance.		
		Real estate.		