

TO: () J. LARSON () R. BROWN
() G. BAUGHER () A. HERNDON
() B. LEIDIGH () J. PRITCHARD
() K. DONOVAN () M. KVASAGER
() J. MCLEAN () C. WARDLOW
() L. MONTGOMERY () H. ARRIOLA
() J. GREENWOOD

FROM: Betty Brown

DATE: 3/19/87

T-87-090

[X] TELEPHONE ADVICE - SEE BELOW

[] CORRESPONDENCE ADVICE - SEE ATTACHED DRAFT

(IF YOU HAVE ANY COMMENTS, NOTIFY ADVISOR WITHIN 1 DAY)

FILE LOCATION: TA & A City of Irvine SEI file

INCLUDE IN ADVICE PACKAGE:

YES [x]

NO []

CALLER Barbara Paliska, Deputy City Clerk

REPRESENTING Mark Haunfelner, Member/City Transportation Commission

PHONE NUMBER: 714-660-3613

QUESTION: Ms. Paliska asked if donations to a trust fund set up to help pay medical bills for Mr. Haunfelner, who is terminally ill, are reportable. Mr. Haunfelner is not involved in soliciting or spending the monies collected. Mr. Haunfelner submits his medical bills to the trustees, and the bills are paid directly. This fund was set up solely by friends to help out with medical expenses. Is this type of fund a gift and reportable?

ANSWER:

I advised Ms. Paliska that money donated to an officeholder's trust fund for medical expenses should be reported as a gift received at the time the donation is made. It should be listed on Schedule F and each donor who donated \$50 or more listed individually. The description should be "donation to medical trust fund." Donations from family or relatives (82028(b)(3)) are not reportable.