

Stradling Yocca Carlson & Rauth LLP 660 Newport Center Drive, Suite 1600 Newport Beach, CA 92660-6422 949 725 4000 stradlinglaw.com

Allison E. Burns 949 725 4187 aburns@stradlinglaw.com

March 26, 2024

Kari Graton, General Manager Spalding Community Services District 502-907 Mahogany Way Susanville, CA 96130

Re:

Spalding Community Services District- Allison E. Burns' Annual 2023-2024

Form 700 and Amendment to Schedule A-2 for 2022-2023 and

Assuming Office Form 700 for Gregory J. Maestri

Dear Kari:

Enclosed please find Allison E. Burns' <u>original</u> Annual Form 700 for filing with respect to the above-listed agency and an Amendment to Schedule A-2 for 2022-2023. Also, enclosed is Gregory J. Maestri's assuming office Form 700 for 2023-2024. If you have any questions, or need additional information, please feel free to contact me.

Very truly yours,

Alicia C. Elam

Assistant to Allison E. Burns, Partner

STRADLING YOCCA CARLSON & RAUTH LLP

:ace Enclosures



## STATEMENT OF ECONOMIC INTERESTS COVER PAGE

Date Initial Filing Received
Filing Official Use Only

A PUBLIC DOCUMENT

Ple	ase type or print in ink.		
NAN	ME OF FILER (LAST)	(FIRST)	(MIDDLE)
В	urns Murillo	Allison	E
1.	Office, Agency, or Court		
	Agency Name (Do not use acronyms)		
	Spalding Community Services District		
	Division, Board, Department, District, if applicable		Your Position
			General Counsel
	▶ If filing for multiple positions, list below or on a	n attachment. (Do not u	se acronyms)
	Agonov		Position:
	Agency.		1 OSIGOTI
2.	Jurisdiction of Office (Check at least o	ne box)	
	State		<ul> <li>Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)</li> </ul>
	Multi-County		County of Lassen
	City of		Other
2			
<b>ა</b> .	Type of Statement (Check at least one l		Landing Officer Date Left
	Annual: The period covered is January 1, 2 December 31, 2023.	023, through	Leaving Office: Date Left/
	The period covered is/	_/, through	<ul> <li>The period covered is January 1, 2023, through the date of leaving office.</li> <li>-or-</li> </ul>
	Assuming Office: Date assumed/_		☐ The period covered is/, through the date of leaving office.
	Candidate: Date of Election	and office sough	nt, if different than Part 1:
1	Schedule Summary (required)	► Total numbe	er of pages including this cover page: 4
۲.	Schedules attached	P Total Hambe	
	_	ttoohod	Schedule C - Income, Loans, & Business Positions – schedule attached
	Schedule A-1 - Investments – schedule a  Schedule A-2 - Investments – schedule a	lacinou	Schedule D - Income - Gifts - schedule attached
	Schedule B - Real Property – schedule a		Schedule E - Income - Gifts - Travel Payments - schedule attached
-(	<b>or-</b> None - No reportable interests of	n any schedule	•
5.	Verification		
	MAILING ADDRESS STREET (Business or Agency Address Recommended - Public Document	CITY nt)	STATE ZIP CODE
	660 Newport Center Drive, Suite 160		oort Beach CA 92660
	DAYTIME TELEPHONE NUMBER		EMAIL ADDRESS
	( 949 ) 725-4187		aburns@stradlinglaw.com
	I have used all reasonable diligence in preparing therein and in any attached schedules is true and	his statement. I have rev complete. I acknowledg	viewed this statement and to the best of my knowledge the information contained the this is a public document.
	I certify under penalty of perjury under the law	vs of the State of Califo	ornia that the foregoing is true and correct.
	128 0001		and offer
	Date Signed March 25, 2024 (month, day, year)		Signature (File the originally signed paper statement with your filing official.)

#### **SCHEDULE A-1** Investments

### Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

Investments must be itemized. Do not attach brokerage or financial statements.

CALIFORNIA FORM	700
FAIR POLITICAL PRACTICES	

Allison Burns Murillo

<b>&gt;</b>	NAME OF BUSINESS ENTITY	▶	NAME OF BUSINESS ENTITY
	Stradling Yocca Carlson & Rauth Investment	1	
	GENERAL DESCRIPTION OF THIS BUSINESS Partnership of 1982		GENERAL DESCRIPTION OF THIS BUSINESS
	Law Firm		
	FAIR MARKET VALUE		FAIR MARKET VALUE
	\$2,000 - \$10,000 \$10,001 - \$100,000		\$2,000 - \$10,000 \$10,001 - \$100,000
	\$100,001 - \$1,000,000 Over \$1,000,000		\$100,001 - \$1,000,000 Over \$1,000,000
	NATURE OF INVESTMENT		NATURE OF INVESTMENT
	Stock Other		Stock Other(Describe)
	(Describe)  Partnership Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)		Partnership Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)
	IF APPLICABLE, LIST DATE:		IF APPLICABLE, LIST DATE:
	05 ,07 , 18 , ,	-	
	ACQUIRED DISPOSED		ACQUIRED DISPOSED
<u> </u>	NAME OF BUSINESS ENTITY	▶	NAME OF BUSINESS ENTITY
	GENERAL DESCRIPTION OF THIS BUSINESS		GENERAL DESCRIPTION OF THIS BUSINESS
	FAIR MARKET VALUE		FAIR MARKET VALUE
	\$2,000 - \$10,000 \$10,001 - \$100,000		\$2,000 - \$10,000 \$10,001 - \$100,000
	\$100,001 - \$1,000,000 Over \$1,000,000		\$100,001 - \$1,000,000 Over \$1,000,000
		1	
	NATURE OF INVESTMENT	1 .	NATURE OF INVESTMENT
	Stock Other (Describe)		Stock (Describe)
	Partnership Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)		Partnership Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)
	IF APPLICABLE, LIST DATE:		IF APPLICABLE, LIST DATE:
	ACQUIRED DISPOSED		ACQUIRED DISPOSED
<u> </u>	NAME OF BUSINESS ENTITY	<b></b>	NAME OF BUSINESS ENTITY
	GENERAL DESCRIPTION OF THIS BUSINESS	1	GENERAL DESCRIPTION OF THIS BUSINESS
	GENERAL BEGORII HON OF THIS BOOMEGO		
	FAIR MARKET VALUE		FAIR MARKET VALUE
	\$2,000 - \$10,000	1	\$2,000 - \$10,000
	S100,001 - \$1,000,000 Over \$1,000,000	1	\$100,001 - \$1,000,000 Over \$1,000,000
	NATURE OF INVESTMENT		NATURE OF INVESTMENT
	Stock Other (Describe)		Stock Other (Describe)
	Partnership Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)		Partnership Income Received of \$0 - \$499 Income Received of \$500 or More (Report on Schedule C)
	IF APPLICABLE, LIST DATE:		IF APPLICABLE, LIST DATE:
	ACQUIRED DISPOSED		ACQUIRED DISPOSED
		1	
Co	omments:		

# **SCHEDULE A-2**

# Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

\* Select from drop down list



Name: Allison Burns Murillo

1. Business Entity or Trust (For reporting a trust, enter the name then skip to box 2.)	áp to box 2.)		N = E		3. Sources of Income of \$10,000 or more	4. Investments or Interests in Real Property Held by the Bus Trust (Use a separate line for each investment or real property interest.)	Interests in Redite line for each invo	al Property Hestment or real	Held by the E	4. Investments or Interests in Real Property Held by the Business Entity or Trust (Use a separate line for each investment or real property interest.)
GENERAL DESCRIPTION OF FAIR MARKET OR BUSINESS ACTIVITY (mm/dd/byyyy)	A P O	NATURE OF INVESTMENT (if "other," describe)*	YOUR BUSINESS POSITION	INCLUDE YOUR PRO RATA SHARE OF GROSS INCOME TO ENTITY/TRUST*	LIST SINGLE SOURCES OF INCOME OF \$10,000 OR MORE	INVESTMENT- BUSINESS ENTITY/NAME, AND BUSINESS ACTIVITY	REAL PROPERTY- LIST PRECISE LOCATION OF REAL PROPERTY	ь	LIST DATE ACQUIRED OR DISPOSED (mm/dd/yyyy)	A INTEREST or (if "other," D describe)*
				Over \$100,000 Allison Murillo Robert Murillo	***************************************	Nuveen Global Cities Real Estate Trust		\$100,001 - \$1,000,000		REIT
			necountry of annual			Pimco Income Institutional Fund		\$100,001 - \$1,000,000	11/10/2023	
						Apollo Diversified Credit Fund		\$100,001 - \$1,000,000	3/23/2023	
						First Trust Alternative Opportunities Fund		\$100,001 - \$1,000,000	1/18/2022	
						Apollo Diversified REIT		\$10,001 -	8/16/2022	REIT

#### SCHEDULE C Income, Loans, & Business **Positions**(Other than Gifts and Travel Payments)

CALIFORNIA FORM 70 FAIR POLITICAL PRACTICES COMMISS	
Name	
Allison Burns Murillo	

1. INCOME RECEIVED	► 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME	NAME OF SOURCE OF INCOME
Stradling Yocca Carlson & Rauth LLP	
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
660 Newport Center Dr#1600 Newport Bch CA92660	
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE
Law Firm	
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
Partner	
GROSS INCOME RECEIVED No Income - Business Position Only	GROSS INCOME RECEIVED No Income - Business Position Only
\$500 - \$1,000 \$1,001 - \$10,000	\$500 - \$1,000 \$1,001 - \$10,000
\$10,001 - \$100,000 OVER \$100,000	S10,001 - \$100,000 OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED	CONSIDERATION FOR WHICH INCOME WAS RECEIVED
Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)	Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)
Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)	Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)
Sale of	Sale of
(Real property, car, boat, etc.)	(Real property, car, boat, etc.)
Loan repayment	Loan repayment
Commission or Rental Income, list each source of \$10,000 or more	Commission or Rental Income, list each source of \$10,000 or more
(Describe)	(Describe)
Other	Other
(Describe)	(Describe)
➤ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING	
a retail installment or credit card transaction, made in t	Il lending institution, or any indebtedness created as part of the lender's regular course of business on terms available I status. Personal loans and loans received not in a lender' vs:
NAME OF LENDER*	INTEREST RATE TERM (Months/Years)
	% None
ADDRESS (Business Address Acceptable)	
	SECURITY FOR LOAN
BUSINESS ACTIVITY, IF ANY, OF LENDER	None Personal residence
	□ Pool Property
HIGHEST BALANCE DURING REPORTING PERIOD	Real PropertyStreet address
\$500 - \$1,000	City
\$1,001 - \$10,000	Guarantor
\$10,001 - \$100,000	
OVER \$100,000	Other
	(Describe)
Comments:	

#### **SCHEDULE A-2**

# Investments, Income, and Assets of Business Entities/Trusts

FAIR POLITICAL PRACTICES COMMISSION

A M E N D M E N T

CALIFORNIA FORM

(Ownership Interest is 10% or Greater)

▶ 1. BUSINESS ENTITY OR TRUST	► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED <u>BY</u> THE BUSINESS ENTITY OR TRUST
Murillo Family Trust	Check one box:
Name	■ INVESTMENT ☐ REAL PROPERTY
660 Newport Center Dr#1600 Newport Beach CA 92660	First Trust Alternative Opportunities Fund
Address (Business Address Acceptable)	Name of Business Entity, if Investment, <u>or</u> Assessor's Parcel Number or Street Address of Real Property
Check one  Trust, go to 2  Business Entity, complete the box, then go to 2	Assessor's Parcel Number or Street Address of Real Property
GENERAL DESCRIPTION OF THIS BUSINESS	Description of Business Activity or City or Other Precise Location of Real Property
FAIR MARKET VALUE	FAIR MARKET VALUE  \$2,000 - \$10,000  \$10,001 - \$100,000  \$100,001 - \$1,000,000  Over \$1,000,000
NATURE OF INVESTMENT Partnership Sole Proprietorship Other  YOUR BUSINESS POSITION	NATURE OF INTEREST Property Ownership/Deed of Trust Stock Partnership Leasehold Yrs. remaining Other
➤ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME <u>TO</u> THE ENTITY/TRUST)	Yrs. remaining  Check box if additional schedules reporting investments or real property are attached
\$0 - \$499	SEE ATTACHMENT FOR ADDITIONAL INVESTMENTS
➤ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)  None or Names listed below	Comments:
Filer's Verification	
Print Name Allison E. Burns Murillo	
Office, Agency or Court Spalding Community Services Distriction	et
Statement Type 2022/2023 Annual 2022 Annual As	suming Leaving Candidate
I have used all reasonable diligence in preparing this statement. I have revicentained herein and in any attached schedules is true and complete.	viewed this statement and to the best of my knowledge the information
I certify under penalty of perjury under the laws of the State of C	alifornia that the foregoing is true and correct.
March \$ 2024	Signature

(month, day, year)

#### **ATTACHMENT**

Investment- Business Entity/Name, and Business Activity	Fair Market Value	Real Property List of Precise Location of Real Property	List Date Acquired or Disposed	Nature of Interest
Nuveen Global Cities Real Estate Trust	\$100,001 - \$1,000,000			REIT
Pimco Income Institutional Fund	\$100,001 - \$1,000,000		11/10/2023	
Apollo Diversified Credit Fund	\$100,001 - \$1,000,000		3/23/2023	
Apollo Diversified REIT	\$10,001 - \$100,000		8/16/2022	REIT

# STATEMENT OF ECONOMIC INTERESTS COVER PAGE

Date Initial Filing Received
Filing Official Use Only

A PUBLIC DOCUMENT

Please type or print in ink.	H H			
NAME OF FILER (LAST)	(FIRST)		(MIDDLE)	
Maestri	Gregory		John	
1. Office, Agency, or Court	-			
Agency Name (Do not use acrony)	ms)			
Spalding Community Servi	ices District			
Division, Board, Department, Distric	t, if applicable	You	Position	
		De	eputy General Counsel	
► If filing for multiple positions, list	below or on an attachment.	(Do not use acronyms)		
Agency:		Po	sition:	
2 Juriodiction of Office (Ch	ank of locations have			
2. Jurisdiction of Office (Ch	eck at least one dox)	П.		Lancard Committee lancar
State			dge, Retired Judge, Pro Tem Jud atewide Jurisdiction)	dge, or Court Commissioner
Multi-County		Co	ounty of Lassen	
City of			her	
3. Type of Statement (Check	at least one box)			
Annual: The period covered		П	.eaving Office: Date Left	<u></u>
December 31, 2023.			(Check one	circle.)
-or- The period covered December 31, 2023.	is	_, unougn	The period covered is January of leaving office.	y 1, 2023, through the date
Assuming Office: Date assu		- <b>c</b>	r- ☐ The period covered is/.	/ through
Assuming Office: Date assu	med		the date of leaving office.	,
Candidate: Date of Election	and o	ffice sought, if different	than Part 1:	
4. Schedule Summary (req	uired) ▶ <i>Tota</i>	I number of pages	including this cover pag	re: 1
Schedules attached	,	, , , , , , , , , , , , , , , , , , , ,	, ,	
Schedule A-1 - Investment	s _ schedule attached	Schedule	C - Income, Loans, & Business	Positions – schedule attached
Schedule A-2 - Investment			D - Income - Gifts - schedule a	
Schedule B - Real Propert		Schedule	E - Income – Gifts – Travel Pay	ments – schedule attached
		a a		
-or- 🗌 None - No reportabl	e interests on any sched	dule		
5. Verification			7	
MAILING ADDRESS STREE (Business or Agency Address Recommende	T d - Public Document)	CITY	STATE	ZIP CODE
660 Newport Center Drive		Newport Beach	CA CA	92660
DAYTIME TELEPHONE NUMBER		EMAIL ADD	RESS	
(949 ) 725-4046			tri@stradlinglaw.com	
I have used all reasonable diligencherein and in any attached schedu	e in preparing this statement. lles is true and complete. I a	I have reviewed this stacknowledge this is a pu	atement and to the best of my know blic document.	owledge the information contained
I certify under penalty of perjury	under the laws of the State	e of California that the	foregoing is true and correct.	
10	2.4		They Want	9
Date Signed March 2, 202	24 day, year)	Signature	(File the originally signed paper state	ement with your filing official.)
(month)			1/ 7	

#### SCHEDULE C Income, Loans, & Business Positions (Other than Gifts and Travel Payments)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
Gregory J. Maestri

1. INCOME RECEIVED	► 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME	NAME OF SOURCE OF INCOME
Stradling Yocca Carlson & Rauth	
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
660 Newport Center Drive. Suite 1600, NB CA 9266	
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE
Law Firm	
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
Associate Attorney	
GROSS INCOME RECEIVED No Income - Business Position Only	GROSS INCOME RECEIVED No Income - Business Position Only
\$500 - \$1,000 \$1,001 - \$10,000	\$500 - \$1,000 \$1,001 - \$10,000
\$10,001 - \$100,000 OVER \$100,000	\$10,001 - \$100,000 OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED	CONSIDERATION FOR WHICH INCOME WAS RECEIVED
Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)	Salary Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)
Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)	Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)
Sale of	Sale of
(Real property, car, boat, etc.)	(Real property, car, boat, etc.)
Loan repayment	Loan repayment
Commission or Rental Income, list each source of \$10,000 or more	Commission or Rental Income, list each source of \$10,000 or more
5	
(Describe)	(Describe)
(Describe)	Other
(Describe)  (Describe)	(Describe)  Other(Describe)
Other(Describe)  2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING	Other(Describe)  PERIOD
Other	PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available I status. Personal loans and loans received not in a lender'
Other	PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available I status. Personal loans and loans received not in a lender'
Other	Other
Other	Describe)  PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available il status. Personal loans and loans received not in a lender's ws:  INTEREST RATE  None  None
* You are not required to report loans from a commercial a retail installment or credit card transaction, made in to members of the public without regard to your official regular course of business must be disclosed as follow NAME OF LENDER*	Other
* You are not required to report loans from a commercial a retail installment or credit card transaction, made in to members of the public without regard to your official regular course of business must be disclosed as follow NAME OF LENDER*	Describe)  PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available il status. Personal loans and loans received not in a lender's ws:  INTEREST RATE  None  None
* You are not required to report loans from a commercial a retail installment or credit card transaction, made in to members of the public without regard to your official regular course of business must be disclosed as follow NAME OF LENDER*  ADDRESS (Business Address Acceptable)	Describe)  PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available il status. Personal loans and loans received not in a lender's vs:  INTEREST RATE  TERM (Months/Years)  None  SECURITY FOR LOAN  None  Personal residence
* You are not required to report loans from a commercial a retail installment or credit card transaction, made in to members of the public without regard to your official regular course of business must be disclosed as follow NAME OF LENDER*  ADDRESS (Business Address Acceptable)  BUSINESS ACTIVITY, IF ANY, OF LENDER	Other
Other	Describe)  PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available it status. Personal loans and loans received not in a lender's vs:  INTEREST RATE  TERM (Months/Years)  None  SECURITY FOR LOAN  None  Real Property  Street address
* You are not required to report loans from a commercial a retail installment or credit card transaction, made in to members of the public without regard to your official regular course of business must be disclosed as follow NAME OF LENDER*  ADDRESS (Business Address Acceptable)  BUSINESS ACTIVITY, IF ANY, OF LENDER  HIGHEST BALANCE DURING REPORTING PERIOD  \$500 - \$1,000	Describe)  PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available it status. Personal loans and loans received not in a lender's ws:  INTEREST RATE  TERM (Months/Years)  ———————————————————————————————————
Other	Describe)  PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available it status. Personal loans and loans received not in a lender's vs:  INTEREST RATE  TERM (Months/Years)  None  SECURITY FOR LOAN  None  Real Property  Street address
* You are not required to report loans from a commercial a retail installment or credit card transaction, made in to members of the public without regard to your official regular course of business must be disclosed as follow NAME OF LENDER*  ADDRESS (Business Address Acceptable)  BUSINESS ACTIVITY, IF ANY, OF LENDER  HIGHEST BALANCE DURING REPORTING PERIOD  \$500 - \$1,000	Describe)  PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available it status. Personal loans and loans received not in a lender'ns:  INTEREST RATE  TERM (Months/Years)  None  SECURITY FOR LOAN  None  Personal residence  Real Property  Street address  City
Other	Describe)  PERIOD  al lending institution, or any indebtedness created as part of the lender's regular course of business on terms available it status. Personal loans and loans received not in a lender's vs:  INTEREST RATE  TERM (Months/Years)  None  SECURITY FOR LOAN  None  Personal residence  Real Property  Street address  City