



11/4/2024

The Honorable City Council
c/o Holly Wolcott, City Clerk
200 North Spring Street
City Hall – 3rd Floor
Los Angeles CA 90012

**Re: Council File Number 24-1200-S60
Appointment of Steven Welliver to the
Central Area Planning Commission**

FOR COUNCIL CONSIDERATION

Dear Councilmembers:

Steven Welliver was appointed by the Mayor's Office to the Central Area Planning Commission on October 10, 2024. The Ethics Commission received notice of the appointment from the Mayor's Office on October 10, 2024. The Ethics Commission notified Mr. Welliver on October 11, 2024 of their filing requirement and received Mr. Welliver's completed pre-confirmation financial disclosure statement on October 31, 2024. In compliance with Los Angeles Municipal Code § 49.5.10, a copy of Mr. Welliver's financial disclosure statement is enclosed.

If you have questions, please feel free to contact me at (213) 978-1960.

Sincerely,

A handwritten signature in cursive script that reads "Carlos Patzi".

Carlos Patzi
Ethics Program Analyst

Enclosures:

Form 700

Form 60

cc: Mayor Karen Bass

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Filed Date: 10/31/2024 03:17 PM
SAN: 011300006-STH-0006

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Welliver Steven

1. Office, Agency, or Court

Agency Name (Do not use acronyms)
Planning Department
Division, Board, Department, District, if applicable Your Position
Member, Area Planning Commission

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

- State Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- Multi-County _____ County of _____
- City of Los Angeles Other _____

3. Type of Statement (Check at least one box)

- Annual: The period covered is January 1, 2023, through December 31, 2023. Leaving Office: Date Left ____/____/____ (Check one circle.)
- or- The period covered is ____/____/____, through December 31, 2023. The period covered is January 1, 2023, through the date of leaving office.
- Assuming Office: Date assumed ____/____/____ -or- The period covered is ____/____/____, through the date of leaving office.
- Candidate: Date of Election 10/10/2024 and office sought, if different than Part 1: _____

4. Schedule Summary (required)

► Total number of pages including this cover page: 3

Schedules attached

- Schedule A-1 - Investments – schedule attached Schedule C - Income, Loans, & Business Positions – schedule attached
- Schedule A-2 - Investments – schedule attached Schedule D - Income – Gifts – schedule attached
- Schedule B - Real Property – schedule attached Schedule E - Income – Gifts – Travel Payments – schedule attached

-or- None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)
DAYTIME TELEPHONE NUMBER EMAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 10/31/2024 03:17 PM Signature _____
(month, day, year) (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.

Name

Steven Welliver

▶ NAME OF BUSINESS ENTITY
Charles Schwab US REIT ETF

GENERAL DESCRIPTION OF THIS BUSINESS
Real Estate Investment

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other ETF
(Describe)

Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
____/____/____ ____/____/____
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)

Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
____/____/____ ____/____/____
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Fundrise

GENERAL DESCRIPTION OF THIS BUSINESS
Real Estate Investment

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other REIT
(Describe)

Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
____/____/____ ____/____/____
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)

Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
____/____/____ ____/____/____
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Masterworks

GENERAL DESCRIPTION OF THIS BUSINESS
Art Investment

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other Investment Funds
(Describe)

Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
____/____/____ ____/____/____
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)

Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
____/____/____ ____/____/____
ACQUIRED DISPOSED

Comments: _____



Ethics Commission
200 N Spring Street
City Hall — 24th Floor
Los Angeles, CA 90012
(213) 978-1960
ethics.lacity.org

Restricted Source Financial Disclosure Statement Form 60

Elected City officials, general managers and chief administrative officers of City agencies, members of City boards and commissions, and individuals nominated to positions subject to City Council approval must file this form in conjunction with the state Form 700. Please refer to the attached instructions for additional information.

Original Filing Amended Filing (original filed on ___/___/20___)

Total Pages: 3

Name: **Welliver, Steven**
(Last, First, Middle)

Agency: **Planning Department** Position: **Member, Area Planning Commission**

Phone: [REDACTED]

Email: [REDACTED]

Type of Statement: Pre-confirmation Date of nomination: 10 / 10 / 2024
 Assuming Office First day in position: ___ / ___ / 20___
 Annual ___ / ___ / 20___ through December 31, 20___
 Leaving Office Last day in office: ___ / ___ / 20___

I had the following interests associated with restricted sources during this reporting period:

- 1. **REAL PROPERTY** — *section attached.*
Interests in real property leased from or to, co-owned by, purchased from, or sold to a restricted source.
- 2. **INVESTMENTS** — *section attached.*
Investments (other than real property) co-owned by, purchased from, or sold to a restricted source.
- 3. **INCOME** — *section attached.*
Income received from a restricted source.
- 4. **GIFTS** — *section attached.*
Gifts, cumulatively valued at \$50 or more, received from a restricted source.
- 5. **BOARD POSITIONS** — *section attached.*
Positions held on the board of a restricted source.

- Or -

- 6. **NO INTERESTS**
I had no interests in real property, investments, income, gifts, or board positions associated with restricted sources during this reporting period.

Certification

I declare under penalty of perjury under the laws of the City of Los Angeles and the state of California that I have read the instructions for this form and the information I have provided is true and complete.

10/31/2024 08:47 PM
Date

[REDACTED]
Signature



Ethics Commission
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 City Hall — 24th Floor
 Los Angeles, CA 90012
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 ethics.lacity.org

Form 60

Section 3 -- Income

Name: Welliver, Steven
(Last, First, Middle)

The following income was received from a restricted source.

Name of restricted source:
Hollywood Partnership Ventures

Address of restricted source:

Business activity of restricted source:
Community Development

Position title:
Executive Director

Income received by:
 Me My spouse/registered domestic partner
 My dependent child

Value of income:
 \$500—\$1,000 \$1,001—\$10,000
 \$10,001—\$100,000 Over \$100,000

Income was:
 Salary/Commission Loan repayment
 Rental income Sale of _____
(e.g., car, boat, etc.)

Other: _____

Name of restricted source:

Address of restricted source:

Business activity of restricted source:

Position title:

Income received by:
 Me My spouse/registered domestic partner
 My dependent child

Value of income:
 \$500—\$1,000 \$1,001—\$10,000
 \$10,001—\$100,000 Over \$100,000

Income was:
 Salary/Commission Loan repayment
 Rental income Sale of _____
(e.g., car, boat, etc.)

Other: _____

Name of restricted source:

Address of restricted source:

Business activity of restricted source:

Position title:

Income received by:
 Me My spouse/registered domestic partner
 My dependent child

Value of income:
 \$500—\$1,000 \$1,001—\$10,000
 \$10,001—\$100,000 Over \$100,000

Income was:
 Salary/Commission Loan repayment
 Rental income Sale of _____
(e.g., car, boat, etc.)

Other: _____

Name of restricted source:

Address of restricted source:

Business activity of restricted source:

Position title:

Income received by:
 Me My spouse/registered domestic partner
 My dependent child

Value of income:
 \$500—\$1,000 \$1,001—\$10,000
 \$10,001—\$100,000 Over \$100,000

Income was:
 Salary/Commission Loan repayment
 Rental income Sale of _____
(e.g., car, boat, etc.)

Other: _____



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Form 60

Section 5 -- Board Positions

Name: **Welliver, Steven**
(Last, First, Middle)

The following positions were held on the board of a restricted source.

Name of restricted source:
Christopher Street West, Inc.

Address of restricted source:
[REDACTED]

Position Title:
Board Treasurer

Position held by:
 Me My spouse/registered domestic partner
 My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:
 Me My spouse/registered domestic partner
 My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:
 Me My spouse/registered domestic partner
 My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:
 Me My spouse/registered domestic partner
 My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:
 Me My spouse/registered domestic partner
 My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:
 Me My spouse/registered domestic partner
 My dependent child