

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Filed Date: 04/01/2024 10:00 AM
SAN: 021500100-STH-0100

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Ortega Adan

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

Metropolitan Water District of Southern California

Division, Board, Department, District, if applicable

Your Position

Board member

► 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
- Multi-County LA, Orange, Riverside, San Bernardino, San Diego & Ventura
- City of _____
- Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- County of _____
- Other _____

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

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

4. Schedule Summary (required)

► Total number of pages including this cover page: 5

Schedules attached

- Schedule A-1 - Investments** – schedule attached
- Schedule A-2 - Investments** – schedule attached
- Schedule B - Real Property** – schedule attached
- Schedule C - Income, Loans, & Business Positions** – schedule attached
- Schedule D - Income – Gifts** – 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 04/01/2024 10:00 AM
(month, day, year)

Signature Adan Ortega
(File the originally signed paper statement with your filing official.)

SCHEDULE A-2

Attachment

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name <u>Adan Ortega</u>

BUSINESS ENTITY OR TRUST : Adan Ortega Associates Inc. (AKA Ortega Strategies Group)

LIST OF REPORTABLE SINGLE SOURCES OF INCOME OF \$10,000 OR MORE
California Association of Mutual Water Companies
Santa Margarita Water District
San Gabriel Valley Water Association
California Association of Mutual Water Companies Joint Powers Risk Insurance Authority
Twentynine Palms Water District
Honeywell International
South Mesa Water Company
Western Heights Water Company
SL Environmental Law
PhibroTech

SCHEDULE D
Income – Gifts

Name
Adan Ortega

▶ NAME OF SOURCE *(Not an Acronym)*
Robert Bowcock
 ADDRESS *(Business Address Acceptable)*
405 North Indian Hill Boulevard, Claremont, CA 91711-4600
 BUSINESS ACTIVITY, IF ANY, OF SOURCE
Friend

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
<u>12 / 10 / 23</u>	<u>\$ 79.97</u>	<u>Cadmus '21 (Wine)</u>
<u> / / </u>	<u>\$ _____</u>	<u>_____</u>
<u> / / </u>	<u>\$ _____</u>	<u>_____</u>

▶ NAME OF SOURCE *(Not an Acronym)*
Margaret Wheeler
 ADDRESS *(Business Address Acceptable)*
700 N. Alameda Blvd., Los Angeles CA 90013
 BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
<u>12 / 01 / 23</u>	<u>\$ 100.00</u>	<u>Art tile by Houston Llew</u>
<u> / / </u>	<u>\$ _____</u>	<u>_____</u>
<u> / / </u>	<u>\$ _____</u>	<u>_____</u>

▶ NAME OF SOURCE *(Not an Acronym)*

 ADDRESS *(Business Address Acceptable)*

 BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
<u> / / </u>	<u>\$ _____</u>	<u>_____</u>
<u> / / </u>	<u>\$ _____</u>	<u>_____</u>
<u> / / </u>	<u>\$ _____</u>	<u>_____</u>

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<u> / / </u>	<u>\$ _____</u>	<u>_____</u>

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<u> / / </u>	<u>\$ _____</u>	<u>_____</u>
<u> / / </u>	<u>\$ _____</u>	<u>_____</u>

Comments: _____