

STATEMENT OF ECONOMIC INTERESTS **COVER PAGE**

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

Please type or print in ink.		SAN. 021000100 0111 0100
NAME OF FILER (LAST)	(FIRST)	(MIDDLE)
Ortega	Adan	
1. Office, Agency, or Court		
Agency Name (Do not use acronyms)		
Metropolitan Water District of South	ern California	
Division, Board, Department, District, if applicable	le	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		 Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
Multi-County LA, Orange, Riverside, San Bern	ardino, San Diego & Ventura	County of
City of		
3. Type of Statement (Check at least one	e box)	
Annual: The period covered is January 1, December 31, 2023.	2023, through	Leaving Office: Date Left/(Check one circle.)
The period covered is/ December 31, 2023.	/, through	 The period covered is January 1, 2023, through the date of leaving office.
Assuming Office: Date assumed	<i></i>	The period covered is/, through the date of leaving office.
Candidate: Date of Election	and office soug	pht, if different than Part 1:
4. Schedule Summary (required)	► Total numb	er of pages including this cover page: 5
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
ON D Nome No was able interests	an ann achadula	
-or- ☐ None - No reportable interests 5. Verification	on any schedule	
MAILING ADDRESS STREET	CITY	STATE ZIP CODE
(Business or Agency Address Recommended - Public Docum		
DAYTIME TELEPHONE NUMBER		EMAIL ADDRESS
DAYTIME TELEPHONE NUMBER		EMAIL ADDRESS
I have used all reasonable diligence in preparing herein and in any attached schedules is true ar		viewed this statement and to the best of my knowledge the information contained ge this is a public document.
I certify under penalty of perjury under the la	•	
Date Signed 04/01/2024 10:00 A	AM	Signature Adan Ortega
(month day year)		(File the originally signed paper statement with your filing official)

SCHEDULE A-2 Investments, Income, and Assets of Business Entities/Trusts (Ownership Interest is 10% or Greater)

CALIFORNIA FORM FAIR POLITICAL PRACTICES COMMISSION Name

Adan Ortega

Adan Ortega Associates Inc. (AKA Ortega Strategies Group) Name 1370 N. Brea Blvd., Suite 235, Fullerton, CA 92835 Address (Business Address Acceptable) Check one Trust, go to 2 Business Entity, complete the box, then go to 2 Trust, go to 2 Business Entity, complete the box, then				
1370 N. Brea Blvd., Suite 235, Fullerton, CA 92835 Address (Business Address Acceptable) Check one Address (Business Address Acceptable) Check one				
Address (Business Address Acceptable) Check one Address (Business Address Acceptable) Check one				
Check one Check one				
☐ Trust, go to 2 ■ Business Entity, complete the box, then go to 2 ☐ Business Entity, complete the box, then				
	n go to 2			
GENERAL DESCRIPTION OF THIS BUSINESS GENERAL DESCRIPTION OF THIS BUSINESS				
Consulting, Association Management				
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: FAIR MARKET VALUE IF APPLICABLE, LIST DATE:	:			
\$\begin{array}{ c c c c c c c c c c c c c c c c c c c	, 23			
	POSED			
× \$100,001 - \$1,000,000				
Over \$1,000,000				
NATURE OF INVESTMENT Partnership Sole Proprietorship X Corporation NATURE OF INVESTMENT Partnership Sole Proprietorship Sole Proprietorship Sole Proprietorship NATURE OF INVESTMENT				
Other Other				
YOUR BUSINESS POSITION Principal YOUR BUSINESS POSITION				
► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME RECEIVED (INCLUDE YOUR SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)	PRO RATA			
\$10,001 - \$10,000 \$10,000 \$10,000 \$10,000 \$10,000 \$10,000				
\$50 - \$10,001 - \$100,000 \$\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \				
\$1,001 - \$10,000				
➤ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.) ➤ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)				
None or X Names listed below None or Names listed below				
SEE ATTACHED				
► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST ► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HEL LEASED BY THE BUSINESS ENTITY OR TRUST	_D OR			
Check one box:				
☐ INVESTMENT ☐ REAL PROPERTY ☐ INVESTMENT ☐ REAL PROPERTY				
Name of Business Entity, if Investment, or Name of Business Entity, if Investment, or				
Assessor's Parcel Number or Street Address of Real Property Assessor's Parcel Number or Street Address of Real Property				
Description of Duciness Astricts on				
Description of Business Activity or City or Other Precise Location of Real Property Description of Business Activity or City or Other Precise Location of Real Property				
FAIR MARKET VALUE IF APPLICABLE, LIST DATE: FAIR MARKET VALUE IF APPLICABLE, LIST DATE	TE:			
\$2,000 - \$10,000 \$10,001 - \$100,000 \$10,001 - \$100,000 \$10,001 - \$100,000 \$10,001 - \$100,000 \$10,001 - \$100,000	, 23			
	POSED			
Over \$1,000,000				
NATURE OF INTEREST Property Ownership/Deed of Trust Stock Partnership NATURE OF INTEREST Property Ownership/Deed of Trust Stock Partnership	nership			
Leasehold Other Other Other Other				
Check box if additional schedules reporting investments or real property	roperty			
are attached				

Comments: _

SCHEDULE A-2

Attachment



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

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION				
Name				
Adan Ortega				

	► 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME	NAME OF SOURCE OF INCOME
Adan Ortega Associates Inc. (AKA Ortega Strategies Group)	
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
1370 N.Brea Bl., #235, Fullerton, CA 92835	
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE
Consulting; Association Management	
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
Principal	
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 \qquad \qqquad \qqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqqq
■ \$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
Salary 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) Salary, Spouses Salary, and Dividend Disbursements	(Describe)
Other Salary, Spouses Salary, and Dividend Disbursements (Describe) (Describe)	Other(Describe)
Other Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING * You are not required to report loans from a commercia	Other(Describe)
(Describe) Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING * 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	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's
Other Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING You are not required to report loans from a commercial a retail installment or credit card transaction, made in	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's
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Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING * You are not required to report loans from a commercia a retail installment or credit card transaction, made in to members of the public without regard to your officia regular course of business must be disclosed as follow NAME OF LENDER*	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'ws:
Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING *You are not required to report loans from a commercia a retail installment or credit card transaction, made in to members of the public without regard to your officia 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 I status. Personal loans and loans received not in a lender's vs: INTEREST RATE TERM (Months/Years) None
Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING * You are not required to report loans from a commercia a retail installment or credit card transaction, made in to members of the public without regard to your officia regular course of business must be disclosed as follow NAME OF LENDER*	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's vs: INTEREST RATE TERM (Months/Years) None SECURITY FOR LOAN
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Other Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING You are not required to report loans from a commercia a retail installment or credit card transaction, made in to members of the public without regard to your officia 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 I status. Personal loans and loans received not in a lender' vs: INTEREST RATE TERM (Months/Years) Mone SECURITY FOR LOAN None Personal residence
Other Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING You are not required to report loans from a commercia a retail installment or credit card transaction, made in to members of the public without regard to your officia regular course of business must be disclosed as follow NAME OF LENDER* ADDRESS (Business Address Acceptable) BUSINESS ACTIVITY, IF ANY, OF LENDER	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'ys: INTEREST RATE Wone SECURITY FOR LOAN None Personal residence
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Other Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING You are not required to report loans from a commercia 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	Describe) 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'y vs: INTEREST RATE TERM (Months/Years) None SECURITY FOR LOAN None Personal residence Real Property Street address City
Other Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING You are not required to report loans from a commercia a retail installment or credit card transaction, made in to members of the public without regard to your officia 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	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'ys: INTEREST RATE Whone SECURITY FOR LOAN None Personal residence Real Property Street address
Other Salary, Spouses Salary, and Dividend Disbursements (Describe) 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING * You are not required to report loans from a commercia 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 \$1,001 - \$10,000	Describe) 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's vs: INTEREST RATE Whone SECURITY FOR LOAN None Personal residence Real Property Street address City

SCHEDULE D Income - Gifts



Name

Adan Ortega

► NAME OF SOURC	CE (Not an Acronym)		► NAME	OF SOURC	E (Not an Acronym))	
Robert Bowcock				► NAME OF SOURCE (Not an Acronym) Margaret Wheeler			
ADDRESS (Business Address Acceptable)				ADDRESS (Business Address Acceptable)			
405 North Indian Hill Boulevard, Claremont, CA 91711-4600			700	700 N. Alameda Blvd., Los Angeles CA 90013			
BUSINESS ACTIVI	ITY, IF ANY, OF SO	URCE	BUSIN	NESS ACTIVI	TY, IF ANY, OF SO	DURCE	
Friend							
DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	DATE	(mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	
<u>12 , 10 , 23</u>	\$ <u>79.97</u>	Cadmus '21 (Wine)	_12_/	<u>, 01 , 23</u>	<u>\$_100.00</u>	Art tile by Houston Llew	
	\$			//_	\$		
	\$			//_	\$		
NAME OF SOURCE	E (Not an Acronym)		► NAME	OF SOURC	E (Not an Acronym)	
ADDRESS (Business Address Acceptable)			ADDR	RESS (Busines	ss Address Accepta	ble)	
BUSINESS ACTIVI	ITY, IF ANY, OF SO	URCE	BUSIN	NESS ACTIVI	TY, IF ANY, OF SO	DURCE	
DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	DATE	(mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	
/	\$			//_	\$		
	\$			//_	\$		
	\$			//_	\$		
NAME OF SOURCE	E (Not an Acronym)		► NAME	OF SOURC	E (Not an Acronym)	
ADDRESS (Busines	ss Address Acceptab	le)	ADDR	RESS (Busines	ss Address Accepta	ble)	
BUSINESS ACTIVI	ITY, IF ANY, OF SO	URCE	BUSIN	NESS ACTIVI	TY, IF ANY, OF SO	DURCE	
DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	DATE	(mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)	
	\$			//_	\$		
	\$			//_			
/	\$			//_	\$		
Comments:							