

**STATEMENT OF ECONOMIC INTERESTS  
COVER PAGE  
A PUBLIC DOCUMENT**

**RECEIVED**

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JAN 18 2024

TULARE COUNTY EMPLOYEES'  
RETIREMENT ASSOCIATION

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)  
MacLean Jeffrey

**1. Office, Agency, or Court**

Agency Name (Do not use acronyms)  
Tulare County Employees' Retirement Association  
Outside party registered investment advisor  
Division, Board, Department, District, if applicable  
Your Position

► 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 Tulare  
☐ City 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.  
-or- ☐ The period covered is / / , through the date of leaving office.

**4. Schedule Summary (required)**

► Total number of pages including this cover page:

**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)  
2321 Rosecrans Ave. #2250 El Segundo CA 90254  
DAYTIME TELEPHONE NUMBER EMAIL ADDRESS  
(310) 297-1777 JMacLean@verusinvestments.com

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 1/12/24 (month, day, year) Signature Jeffrey MacLean  
(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 **700**

FAIR POLITICAL PRACTICES COMMISSION

Name

### 1. BUSINESS ENTITY OR TRUST

Verus Advisory, Inc.

Name

2321 Rosecrans Ave. #2250, El Segundo, CA 90254

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

#### GENERAL DESCRIPTION OF THIS BUSINESS

Investment Consulting

#### FAIR MARKET VALUE

- ☐ \$0 - \$1,999  
☐ \$2,000 - \$10,000  
☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000  
☒ Over \$1,000,000

#### IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23 ACQUIRED \_\_\_\_\_/\_\_\_\_\_/23 DISPOSED

#### NATURE OF INVESTMENT

☐ Partnership ☐ Sole Proprietorship ☒ Stock ☐ Other

YOUR BUSINESS POSITION CEO

### 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- ☐ \$0 - \$499 ☐ \$10,001 - \$100,000 n/a, entity does not use prorata allocations  
☐ \$500 - \$1,000 ☐ OVER \$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.)

☐ None or ☒ Names listed below

Verus Advisory, Inc.

### 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY n/a

Name of Business Entity, if Investment, or  
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or  
City or Other Precise Location of Real Property

#### FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000  
☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000  
☐ Over \$1,000,000

#### IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23 ACQUIRED \_\_\_\_\_/\_\_\_\_\_/23 DISPOSED

#### NATURE OF INTEREST

☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold \_\_\_\_\_ Yrs. remaining ☐ Other \_\_\_\_\_

☐ Check box if additional schedules reporting investments or real property are attached

### 1. BUSINESS ENTITY OR TRUST

Name

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2

#### GENERAL DESCRIPTION OF THIS BUSINESS

#### FAIR MARKET VALUE

- ☐ \$0 - \$1,999  
☐ \$2,000 - \$10,000  
☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000  
☐ Over \$1,000,000

#### IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23 ACQUIRED \_\_\_\_\_/\_\_\_\_\_/23 DISPOSED

#### NATURE OF INVESTMENT

☐ Partnership ☐ Sole Proprietorship ☐ Other

YOUR BUSINESS POSITION

### 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- ☐ \$0 - \$499 ☐ \$10,001 - \$100,000  
☐ \$500 - \$1,000 ☐ OVER \$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.)

☐ None or ☐ Names listed below

### 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

Name of Business Entity, if Investment, or  
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or  
City or Other Precise Location of Real Property

#### FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000  
☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000  
☐ Over \$1,000,000

#### IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/23 ACQUIRED \_\_\_\_\_/\_\_\_\_\_/23 DISPOSED

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☐ Leasehold \_\_\_\_\_ Yrs. remaining ☐ Other \_\_\_\_\_

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Comments: