



FINANCIAL DISCLOSURE STATEMENT
for the period January 1, 2024 through date of termination _____

| | | |
|------------|----------------|-----------|
| First Name | Middle Initial | Last Name |
|------------|----------------|-----------|

Mailing Address (work or home). If this is your home address, please check here ☐

City, Town, or Post Office, State and Zip Code

| | |
|-------|-------|
| Phone | Email |
|-------|-------|

Position Held or Candidate For (circle one)

This statement lists all interests and related matters required to be disclosed pursuant to Article 7 of the Anne Arundel County Code, the Public Ethics Law, for the calendar year **2024**. The statement consists of this cover sheet, together with Schedules A–I, and any additional attachments. **The statement must be completely filled out before it will be accepted. Failure to file, or to file a fully completed statement, constitutes a violation of Title 6 of the Public Ethics Law.** Use additional paper as necessary. An individual who is required to disclose the name of a business in this statement must disclose any other names that the business is trading as or doing business as.

Oath and Signature

I solemnly swear or affirm under the penalties of perjury that the contents of this statement, including any attachments thereto, are complete, true, and correct based on my personal knowledge.

| | |
|------|-----------|
| Date | Signature |
|------|-----------|

SCHEDULE A: REAL PROPERTY INTERESTS

1. Did you own or have any ownership interest in any real property, including leasehold interests, located in or out of Maryland? Include any leases that you are a party to either as a tenant or landlord.

Yes

No

If yes, complete Schedule A for each property interest. (Make copies of this schedule, if necessary.) If no, go to the next schedule.

2. List the street address (or mailing address or legal description), city, state, and zip code for each property.

3. List the improvements to each property, including buildings or other structures.

4. Describe the uses of each property, including residential, commercial, agricultural, industrial, mineral, etc.

5. State whether you hold each property interest directly, or whether it is attributable (see definitions) to you. If attributable, state how.

6. State whether each property interest is held in fee simple, joint tenancy, tenancy in common, tenancy by the entireties, leasehold, or life estate.

7. If you are not the sole holder of each interest:

(a) state the percentage of each interest held by you; and

(b) state the names of all other persons holding an interest in each property.

8. List conditions or encumbrances (mortgages, liens, contracts, options, etc.) affecting your interest in each property, and the name of the person that holds each encumbrance (mortgage companies, lenders, creditors, etc.).

9. State the date each property interest was acquired by you.

10. State the manner in which each property interest was acquired (purchase, gift, will, etc.).

11. State the name of the person from whom each property interest was acquired.
12. State the amount of money or the nature and value of any other consideration given for each property interest. If it was acquired other than by purchase (e.g., gift or will), state the fair market value of each property interest at the time acquired.
13. If all or part of any property interest was transferred by you during the period covered by this statement:
 - (a) describe the interest transferred;
 - (b) state the nature and the amount of consideration received in exchange for the interest; and
 - (c) state the name of the person to whom the interest was transferred.

SCHEDULE B: INTERESTS IN BUSINESS ENTITIES

1. Did you have an interest in any business entity (see definitions), whether corporate or noncorporate? **(All filers must disclose information pertaining to stock ownership and in addition, elected employees must disclose information pertaining to mutual funds.)**

Yes

No

If yes, complete Schedule B for each interest. (Make copies of this schedule if necessary.) If no, go to the next schedule.

2. State the complete name, address and telephone number of the principal office of each business entity in which you had an interest.

3. Describe the type of work performed by each business entity.

4. Describe the nature of your interest in each business entity (e.g., sole proprietor, partner, member, stockholder, director, trustee, etc.). If the interest was attributable (see definitions) to you, state how.

5. State the amount of interest held in each business entity:

(a) If the business entity is a publicly traded corporation, state the number of shares owned.

(b) If the business entity is a non-publicly traded corporation, state the number of shares owned and the percentage of ownership.

(c) If the business entity is a noncorporate business, state the percentage of the equity interest held.

6. List any conditions or encumbrances (mortgages, liens, contracts, options, etc.) affecting your interest in each business entity, and the name of the person that holds each encumbrance (mortgage companies, lenders, creditors, etc.).

7. (a) For each interest in a business entity acquired by you during the applicable period, other than acquisitions made in accordance with item 7(b) below, state:

i. the date it was acquired;

ii. the manner in which it was acquired (e.g., purchase, gift, or will);

iii. the name of the person from whom it was acquired;

iv. the amount of money or other consideration paid, or to be paid, for the interest, if the interest was acquired by purchase;

v. the fair market value of the interest at the time it was acquired, if it was NOT acquired by purchase.

(b) If you acquired any interest in a publicly traded corporate business entity during the applicable period solely through dividend or dividend reinvestment, and the total value of the acquisition was less than \$500.00, state the name of each business entity.

8. If any interest in a business entity was transferred by you during the applicable period, state:

(a) the nature of each interest transferred;

(b) the amount of money or other consideration received, or to be received, for the interest, if the interest was transferred by sale;

(c) the person to whom each interest was transferred.

9. For any interest in a business entity that does business with the County (see definitions) or did business with the County during the applicable period, describe the nature of the business done with the County.

SCHEDULE C: GIFTS AND HONORARIA

1. Did you receive, either directly or indirectly, from (or on behalf of) any person or business entity that is doing business with the County, or is regulated by the County, or is a lobbyist, or an entity or individual acting on behalf of an entity that is engaged only in representing counties or municipal corporations:

(a) any individual gift worth \$20 or more; or (b) a series of gifts totaling \$50 or more from any one person or entity listed above? **Note:** Do not include political contributions (Election Law, Section 1-101(o) of the *Annotated Code of Maryland*) or gifts received from your spouse, parents, or children.

Yes

No

If yes, complete item #2 of this Schedule for each gift. If no, go to item #3 on this schedule.

2. (a) Describe each gift (including cash).

(b) State the retail value of each gift.

(c) State the name of the person or entity from whom, or on whose behalf, each gift was received.

(d) State the name of any other person or entity receiving each gift, if it was given to that person or entity at your request.

3. Did you receive any honoraria for speaking at, participating in, or attending a meeting or other function, or for writing an article that has been or is intended to be published?

Yes

No

If yes, complete this item. If no, go to the next schedule.

(a) Describe the service performed for each honorarium.

(b) State the type of each honorarium received, and the value of the honorarium (including cash).

(c) State the name of the person from whom, or on whose behalf, each honorarium was received.

SCHEDULE D: OFFICES, DIRECTORSHIPS, AND EMPLOYMENT IN BUSINESS ENTITIES

1. Did you, a relative (see definition), or a relative of your spouse, hold any office, directorship, employment or other similar interest in any "entity doing business with the County" (see definition) that was not disclosed in any other schedule of this statement?

Yes

No

If yes, complete Schedule D for each business entity. If no, go to the next schedule.

2. (a) State the name of the person holding any office, directorship, employment or other similar interest in any entity doing business with the County and state the relationship of that person to you.

(b) State the name and address of the principal office of each entity.

(c) State the title and nature of each office, directorship, or salaried employment, and the date it commenced.

(d) State the name of each government unit (see definition), with which each entity does business and the nature of the business that the entity does with that unit.

SCHEDULE E: DEBTS OWED TO BUSINESS ENTITIES DOING BUSINESS WITH THE COUNTY

1. Did you, your spouse, or any dependent children, owe any debt, except for retail credit accounts, to any person or business entity (see definition) that does business with the County of which business you may reasonably be expected to know? Disclose the debts incurred by your spouse or dependent children only if you were involved in the transaction giving rise to the debt, or if you are, or could become, liable for the debt.

Yes

No

If yes, complete Schedule E for each debt. If no, go to the next schedule.

2. (a) State the name of the person to whom each debt was owed.

(b) State the date each debt was incurred.

(c) State the name of the person who incurred each debt and that person's relationship to you.

(d) State the amount of the debt owed as of the end of the applicable period of this statement.

(e) State the terms for payment of the debt, including the rate of interest, if any.

(f) State whether the principal was increased or decreased during the year and by what amount.

(g) Describe the security, if any, given for the debt.

SCHEDULE F: EMPLOYMENT BY THE COUNTY

1. Were any of your relatives (see definition), or relatives of your spouse, employed by the County in any capacity, whether or not compensated?

Yes

No

If yes, complete Schedule F for each person. If no, go to the next schedule.

2. (a) State the name of each relative employed by the County, and that person's relationship to you.

(b) State the name of the County agency, board, or commission, authority or other entity where each person was employed.

(c) State the position each person held with the County agency, board, commission, authority, or other entity.

SCHEDULE G: EMPLOYMENT/BUSINESS OWNERSHIP

1. Did you, your spouse, or any dependent children engage in compensated employment during the calendar year covered by this statement (include your County employment)?

Yes

No

If yes, state the name and address of each place of employment and the name and relationship to you of the person employed.

2. Did you, your spouse, or any dependent children own, in whole or in part, any business entity from which income was earned or received during the calendar year?

Yes

No

If yes, state the name and address of each business entity from which income was earned or received and the name and relationship to you of the person who earned or received that income.

3. Is your spouse a regulated lobbyist with the County?

Yes

No

If yes, list all entities that have employed your spouse for the purpose of lobbying.

SCHEDULE H: RELATIONSHIP WITH UNIVERSITY OF MARYLAND MEDICAL SYSTEM, STATE OR LOCAL GOVERNMENT, OR QUASI-GOVERNMENTAL ENTITY:

1. Do you have any financial or contractual relationship with (i) the University of Maryland Medical System, (ii) a governmental entity of the State or local government in the State, or (iii) a quasi-governmental entity of the State or local government in the State?

Yes

No

If yes to any of the above, describe the nature of the relationship, the subject matter of the relationship, and any consideration received as a result of that relationship during the reporting period.

SCHEDULE I: OTHER INTERESTS AND INFORMATION

Please list any additional interests or information not listed on any other Schedule that you want to disclose.