



**Instructions:**

1. Check the proper block to Questions A through I. Do not leave any questions unanswered. If you check "Yes" to any question be sure to complete the corresponding Schedule.

2. Interests attributable. -- For Schedules A, B and C, the following are deemed to be interests of the individual:

- a) an interest held by a spouse or child of the individual, if the interest was controlled, directly or indirectly, by the individual at any time during the applicable period;
- b) an interest held by a business entity in which the individual held a 30% or greater interest at any time during the applicable period; and
- c) an interest held by a trust or an estate in which, at any time during the applicable period, the individual:
  - (i) held a reversionary interest;
  - (ii) as a beneficiary; or
  - (iii) if a revocable trust, was a settlor.

	YES	NO
A. I held interests during reporting period in real property located in or outside Maryland. (If "Yes," complete Schedule A.)		
B. I held interests in a business entity during the reporting period. (If "Yes," complete Schedule B.)		
C. I held interests in a business entity which did business with the PGCBOE and/or PGCPs. (If "Yes," complete Schedule C.)		
D. I received gifts during reporting period from persons doing business with the PGCBOE and/or PGCPs, regulated by the PGCBOE and/or PGCPs, or registered or required to register as lobbyists. (If "Yes," complete Schedule D.)		
E. I or a member of my immediate family was a partner or held an office, directorship, or salaried employment during reporting period in or with a business entity doing business with the PGCBOE and/or PGCPs. (If "Yes," complete Schedule E.)		
F. I or a member of my immediate family owed debts (excluding retail credit accounts) during reporting period to persons doing business with the PGCBOE and/or PGCPs. (If "Yes," complete Schedule F.)		
G. A member of my immediate family was employed by PGCBOE and/or PGCPs during reporting period. (If "Yes," complete Schedule G.)		
H. I or a member of my immediate family received a salary or was sole or partial owner of a business entity doing business with the PGCBOE and/or PGCPs from which earned income was received, during the reporting period. (If "Yes," complete Schedule H.)		
I. Is additional information set forth on Schedule I? (If "Yes," complete Schedule I.)		

## Schedule A – Real Property Interests

Do you have any interest (**as an owner or a tenant**, including interests in time shares) in real property in Maryland or in any other state or country?

Yes

No (Go to Schedule B)

**If Yes; (Answer each question below. A separate Schedule A will be required for each property you need to disclose.)**

1. What is the address or legal description of the property? (Give Street Address, if you know it. If the property is your primary residence, you may enter the lot and block legal description instead, if you wish)

Street Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

2. What kind of property is it?

Improved (indicate whether property is residential or commercial property): \_\_\_\_\_

Unimproved (vacant lot): \_\_\_\_\_

3. Is the interest held directly by you or is it attributable to you? (See Paragraph 2 of Instructions for definition of "Attributable.")

Direct \_\_\_\_\_ Attributable \_\_\_\_\_

4. Are you the owner or tenant?

Owner \_\_\_\_\_ Tenant \_\_\_\_\_

5. Do you hold the interest solely or is it jointly held with another?

Solely \_\_\_\_\_ Jointly \_\_\_\_\_ Tenants by the Entirety \_\_\_\_\_

If held jointly, or by tenants by the entirety, the name(s) of the other joint owner(s): \_\_\_\_\_

6. Are there any legal conditions or encumbrances on the property? (Example: mortgages, liens, contracts, options, etc.)

Yes

No

**If yes**, what is/are the name(s) of the lender(s), creditor(s), lien holder(s), etc? \_\_\_\_\_

7. What date was the property acquired? \_\_\_\_\_

8. How was the property acquired? (Example: purchase, gift, inheritance, etc.)

\_\_\_\_\_

9. From whom was the property acquired? (Name of individual or entity from whom you purchased or inherited the property or who gifted the property to you.)

\_\_\_\_\_

10. What consideration was given when the property was acquired? (Dollar amount paid or, if you received the property as a gift or inherited it, the fair market value at the time you acquired your interest in the property) Select one:

None

Below \$25,000

\$25,000 - \$99,999

\$100,000 – \$299,999

\$300,000 – \$499,999

\$500,000 + above

11. Have you transferred any interest in this property during the reporting period?

Yes

No

**If Yes;**

11.A. What percentage of interest did you transfer: \_\_\_\_\_%

11.B. What consideration did you receive for the interest during the reporting period?

Select one:

None

Below \$25,000

\$25,000 - \$99,999

\$100,000 – \$299,999

\$300,000 – \$499,999

\$500,000 + above

11.C. Did you transfer the interest to any individual or entity doing business with the PGCBOE and/or PGCPs?  Yes  No

**If you have any additional interests in real property in Maryland, any other state or any other country, please use additional sheet(s), if necessary, and respond to each above question for each such entry.**

## Schedule B – Interests in Corporations and Partnerships

Did you have any interest in any corporations, partnerships, limited liability partnerships (LLP) or limited liability companies (LLC) during the reporting period whether or not the entity did business with the PGCBOE and/or PGCPs?

- Yes  
 No (Go to Schedule C)

**If Yes; (Answer each question below. A separate Schedule B will be required for each interest you need to disclose.)**

1. What is the name of the entity? Include the complete name of the entity, do not identify solely by trading symbol: \_\_\_\_\_

2. Does the stock of the corporation trade on a stock exchange?

- Yes  
 No

If "no," the legal address of the entity's principal office.

\_\_\_\_\_

3. Is the interest held directly by you or is it attributable to you? (See Paragraph 2 of Instructions for definition of "Attributable.")

Directly: \_\_\_\_\_ Attributable: \_\_\_\_\_

4. Do you hold the interest in your name alone, or is it held jointly?

In your name alone: \_\_\_\_\_ Jointly: \_\_\_\_\_

If jointly, the percentage of your interest: \_\_\_\_\_%

5. What is the nature of your interest and its dollar value or the number of shares? (Example: stock, notes, bonds, puts, calls, straddles, purchase options, etc.) If in a non-publicly traded entity or LLP or LLC, report the percentage of ownership.

Type: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

Percentage of ownership: \_\_\_\_\_%

6. Are there any legal conditions or encumbrances that apply to your interest in the entity? (Example: mortgages, liens, contracts, options, etc.)

- No  
 Yes; **If yes**, name of entity holding the encumbrance: \_\_\_\_\_

7. Did you acquire an interest in the entity during the reporting period?

- Yes  
 No

**If Yes:**

7A. In what month was the interest acquired? \_\_\_\_\_

7B. How was the interest in the entity acquired? (Example: purchase, gift, will, etc.): \_\_\_\_\_

7C. From whom did you acquire the interest in the entity? (If you purchased it from a brokerage, the name of the brokerage): \_\_\_\_\_

7D. What consideration was given when the interest was acquired? (Dollar amount paid, or if you received the property as a gift or inherited it, the fair market value at the time you acquired your interest in the property) Select one:

\_\_\_\_\_ None

\_\_\_\_\_ Below \$25,000

\_\_\_\_\_ \$25,000 - \$99,999

\_\_\_\_\_ \$100,000 – \$299,999

\_\_\_\_\_ \$300,000 – \$499,999

\_\_\_\_\_ \$500,000 + above

8. Have you transferred any interest in this entity during the reporting period?

\_\_\_ Yes

\_\_\_ No

**If Yes:**

8A. What portion of the interest was transferred? \_\_\_\_\_

8B. What consideration did you receive for the interest in the entity? (Dollar amount paid, or if you received the property as a gift or inherited it, the fair market value and terms at the time you transferred your interest in the property) Select one:

\_\_\_\_\_ None

\_\_\_\_\_ Below \$25,000

\_\_\_\_\_ \$25,000 - \$99,999

\_\_\_\_\_ \$100,000 – \$299,999

\_\_\_\_\_ \$300,000 – \$499,999

\_\_\_\_\_ \$500,000 + above

8C. Did you transfer the interest to any individual or entity doing business with the PGCBOE and/or PGCPs? \_\_\_Yes \_\_\_No

**If you have additional interests in corporations or partnerships, please use additional sheet(s) if necessary, and answer each of the above questions for each additional entry.**

**Schedule C – Interests in Business Entities Doing Business with the PGCBOE and/or PGCPs.**

Do you have an interest in any business entity that did business with the PGCBOE and/or PGCPs during the reporting period?

- Yes
- No (Go to Schedule D)

**If Yes: (Answer each question below. A separate Schedule C will be required for each business entity to be disclosed.)**

1. Name and Address of the Principal office of the business entity?

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

2. Is the interest held directly by you or is it attributable to you? (See Paragraph 2 of Instructions for definition of "Attributable.")

Direct: \_\_\_\_\_ Attributable: \_\_\_\_\_

3. Do you hold the interest solely or is it jointly held with another?

Solely: \_\_\_\_\_ Jointly: \_\_\_\_\_

3.A. If jointly, the percentage of your joint interest: \_\_\_\_\_%

3.B. Percentage of your interest in the entity: \_\_\_\_\_%

4. Are there any legal conditions or encumbrances that apply to your interest in the entity? (Example: mortgages, liens, contracts, options, etc.)

- Yes, If yes give name of creditor: \_\_\_\_\_
- No

5. Was any interest acquired during the reporting year?

- Yes
- No

**If Yes:**

5A. What month was the interest acquired? \_\_\_\_\_

5B. How was the interest in the entity acquired? (Example: purchase, gift, will, etc.)  
\_\_\_\_\_

5C. From whom did you acquire the interest? \_\_\_\_\_

5D. What consideration was given when the interest was acquired? (Dollar amount paid or if you received the property as a gift or inherited it, the fair market value at the time you acquired your interest in the property) Select one:

- None
- Below \$25,000
- \$25,000 - \$99,999
- \$100,000 – \$299,999
- \$300,000 – \$499,999
- \$500,000 + above

6. Did you transfer any of your interest during the reporting period?

- Yes
- No

**If yes:**

6A. What percentage of interest, if less than all, was transferred? \_\_\_\_\_%

6B. What consideration did you receive for the interest in the entity? (Dollar amount paid or if you received the property as a gift or inherited it, the fair market value and terms at the time you transferred your interest in the property): Select one:

- None
- Below \$25,000
- \$25,000 - \$99,999
- \$100,000 – \$299,999
- \$300,000 – \$499,999
- \$500,000 + above

6C. Did you transfer the interest to any individual or entity doing business with the PGCBOE and/or PGCPs?  Yes  No

**A separate schedule C will be required for each business entity. Please use additional sheet(s) if necessary for any additional entries.**

## Schedule D – Gifts

During the reporting period, did you receive any gift(s), directly or indirectly as defined in Board Policy 0107 (C) (7)— the transfer of anything of economic value, regardless of the form, without adequate and lawful consideration. Gift does not include political campaign contributions regulated under the Elections Article, Annotated Code of Maryland, or any other provision of State or local law regulating the conduct of elections or the receipt of political campaign contributions. Gifts received from a member of the official's or employee's immediate family, another child, or a parent of the individual, do not need to be disclosed.

Yes

No (Go to Schedule E)

**If Yes; (Answer each question below. A separate Schedule D will be required for each gift.)**

1. Who gave you the gift?

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2. What was the nature of the gift? (Example: book, restaurant meal, theater tickets, book, etc.)

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3. What was the value of the gift?

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4. If the gift was given to someone else at your direction, list the identity of the recipient of the gift.

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**Please use additional sheet(s), if necessary, for any additional entries.**

**Schedule E – Officers, Directorships, Salaried Employment and Similar Interests**

During the reporting period, did you or any member of your immediate family (spouse or dependent child) have any salaried employment or hold any office or directorship with an entity that did business with the PGCBOE and/or PGCPs?

\_\_\_ Yes

\_\_\_ No (Go to Schedule F)

**If Yes; (Answer each question below. A separate Schedule E will be required for each disclosure.)**

1. What is the name and address of the business entity?

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

2. Who was the individual who held the position or interest listed above? (Example: yourself, spouse, dependent child)

Self: \_\_\_\_\_ Spouse: \_\_\_\_\_ Dependent child: \_\_\_\_\_

2A. Name of spouse or dependent child: \_\_\_\_\_

3. What is the title of the office you, your spouse or dependent child held? (Example: limited partner, director, treasurer, chair of the board of trustees, etc.) \_\_\_\_\_

4. What year did the position begin? \_\_\_\_\_

5. With what PGCBOE or PGCPs office/department did the business entity do business? \_\_\_\_\_

6. What was the nature of the business? (Example: contract with PGCPs and/or PGCBOE, registered under the lobbying law, or involved with other business with the PGCPs and/or PGCBOE)

\_\_\_\_\_

**If necessary, please use additional sheet(s) for any additional entries.**

## Schedule F – Debts You Owe

During the reporting period, did you owe a debt (excluding a retail credit account) to a financial entity that did business with the PGBOE and/or PGCPs? **[NOTE: If, on Schedule A, B or C you listed a financial entity that did business with the PGBOE and/or PGCPs as the holder of your mortgage or other encumbrance, you must complete Schedule F with regard to that indebtedness.]**

Yes

No (Go to Schedule G)

**If Yes: (Answer each question below. A separate Schedule F will be required for each debt to be disclosed.)**

1. To whom did you owe the debt? (Do not include consumer credit debts)

\_\_\_\_\_

2. When was the debt incurred? \_\_\_\_\_

3. What are the interest rate and terms of payment of the debt?

Interest Rate \_\_\_\_\_

Terms (monthly, bimonthly, annually, etc): \_\_\_\_\_

4. What was the amount of the debt as of the end of the reporting period. If debt existed during the reporting period but was paid in full at the end of the period, put \$0.

Select one:

\$0

Below \$25,000

\$25,000 - \$99,999

\$100,000 – \$299,999

\$300,000 – \$499,999

\$500,000 + above

5. Did the principal of the debt increase \_\_\_\_\_ or decrease \_\_\_\_\_ during the reporting period, and by how much? \$ \_\_\_\_\_

6. Was any security given for the debt?

Yes

No

If Yes; Please state what type of security was given (home, car, boat, etc):

\_\_\_\_\_

7. If this is a transaction in which you were involved, but which resulted in a debt being owed by your spouse or dependent child, identify your spouse or child and describe the transaction. \_\_\_\_\_

**If necessary, please use additional sheet(s) for any additional entries.**

**Schedule G – Family Members Employed by the PGCBOE and/or PGCPS**

During the reporting period, were any members of your immediate family (spouse or dependent children) employed by the PGCBOE and/or PGCPS in any capacity?

Yes

No (Go to Schedule H)

**If Yes; (Answer each question below. A separate Schedule G will be required for each member of the immediate family who is employed by the PGCPS.)**

1. What is the relation and name of the immediate family member employed by the PGCBOE and/or PGCPS? \_\_\_\_\_

2. What was the title of your immediate family member's position in the PGCBOE and/or PGCPS during the reporting period? \_\_\_\_\_

**If necessary, please use additional sheet(s) for any additional entries.**

## Schedule H – Employment/Business Ownership

During the reporting period, were you or any member of your immediate family, receiving a salary from or a sole/partial owner of a business entity doing business with the PGCBOE or PGCPS from which earned income was received? Please note that your dependent child's employment or business ownership does not need to be disclosed unless the place of employment or the business entity is subject to regulation or the authority of the PGCBOE and/or PGCPS or has contracts in excess of \$10,000 with the PGCBOE and/or PGCPS.

\_\_\_ Yes

\_\_\_ No (Go to Schedule I)

**If Yes; (Answer each question below. A separate Schedule H will be required for each member of the immediate family who had employment or ownership of a business entity.)**

1. If, during the reporting period, you or a member of your immediate family had employment from which you or they earned income from the PGCBOE and/or PGCPS, list the relation, name, and address of the employment.

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Name of Employer: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

2. If, during the reporting period, you or a member of your immediate family wholly or partially owned any business entity from which income was earned from the PGCBOE and/or PGCPS, list the relation, name and address of the business entity.

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Name of Business Entity: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

**If necessary, please use additional sheet(s) for any additional entries.**

**Schedule I – Additional Information**

During the reporting period, was there additional information that is required to be disclosed?

- Yes
- No

Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_