

TOWN OF UNIVERSITY PARK ELECTION INFORMATION FOR CANDIDATES

A Town Election will be held for the

Offices of

Councilmember Ward 2
Councilmember Ward 4
Councilmember Ward 5
Councilmember Ward 6

on

Tuesday, May 9, 2023

You are encouraged to vote-by-mail but may vote in person on Election Day between the hours of 1:00 p.m. and 8:00 p.m. at Town Hall. All ballots must be received by 8 p.m. on Election Day in order to be counted.

REGISTER TO VOTE:

Register to vote the following ways:

- Register to vote online at: http://www.elections.state.md.us/voter_registration/

OR

- Contact the Prince George's County Board of Elections at 1100 Mercantile Lane Suite 115A, Largo, MD 20774, Monday – Friday, 8 a.m. – 4:30 p.m.; Phone: 301-341-7300

Residents wishing to vote in the upcoming election must be:

1. A citizen of the United States,
2. 18 years of age or older on the date of Election Day,
3. A resident of University Park, and
4. Registered to vote at least 30 days prior to Election Day

CANDIDATES:

Candidate packets (Candidate Petition and Financial Disclosure Statement) are available on the Town website www.upmd.org/elections. If residents have any questions, please contact the Town Clerk's Office at 301-927-4262 ext. 101 or email the Town Clerk at townhall@upmd.org.

DEADLINES:

Monday, April 10 is the last day to register to vote.

Monday, April 10 by 5 p.m. is the last day to file as a candidate.

Thursday, May 4 by 5 p.m. is the last day to file as a qualified write-in candidate.

Town of University Park
Council Candidate Petition

The residents below, being qualified voters
of the Town of University Park,
do hereby endorse the candidacy of:

(write given name, including middle initial)

for Ward ____ Councilmember of University Park and hereby request that
this name be placed on the ballot to be used at that Election to be held on
TUESDAY, MAY 9, 2023

*You must submit your petition by 5:00 p.m. on Monday, April 10 to have your name appear
on the ballot.*

Candidate's Name (print): _____

Candidate's Signature: _____

TO BE VALID, THIS PETITION MUST LIST THE NAMES AT LEAST TEN
(10) QUALIFIED VOTERS.

*(It is suggested that the candidate obtain more than the minimum number of names required in the
event any are invalidated.)*

PLEASE PRINT LEGIBLY

	<u>PRINT NAME</u>	<u>ADDRESS</u>	<u>EMAIL OR PHONE #</u>
1.			
2.			
3.			
4.			
5.			
6.			

PLEASE PRINT LEGIBLY

	<u>PRINT NAME</u>	<u>ADDRESS</u>	<u>EMAIL OR PHONE #</u>
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**TOWN OF UNIVERSITY PARK ETHICS COMMISSION
FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS**

A MESSAGE TO THOSE WHO ARE REQUIRED TO FILE DISCLOSURE STATEMENTS

Please read the instructions carefully and be sure to provide all information requested for each interest you disclose on your statement. If you have any questions about the application of the Law, you may contact the Town Ethics Commission. Some schedules on the statement may require knowledge regarding whether an entity does business with the Town. You may access that information by contacting Town Hall. If you have a question about a particular entity or need other assistance in completing the form, do not hesitate to contact the Town Ethics Commission through the Town Clerk's Office.

Financial disclosure statements are public records that may be examined or copied by the public. At the top of the form we have provided a place for you to check if you want the Commission to notify you of the names and addresses of any persons who have examined or copied your statement.

Thank you for your cooperation.

GENERAL INSTRUCTIONS

A. Persons Required to File Financial Disclosure Statements

Town Elected officials or candidates for office as Town elected officials are required to file this financial disclosure statement.

B. When to File.

1. A person holding an office for which a financial disclosure statement is required, must file **on or before April 30th each year during that person's term in office for the immediately preceding calendar year.** The statement due April 30 shall be for the period commencing January 1 and ending December 31 in the previous year.
2. A person who does not have a current financial disclosure statement on file and who is appointed to fill a vacancy in a position or office for which a statement must be filed, shall file a statement **within 30 days** after appointment **for the previous calendar year.**
3. If a person in a position requiring disclosure **leaves the position** after January 1 but prior to filing the regular annual statement due April 30th, he or she must file the **annual statement** (covering the preceding calendar year), plus an **additional termination statement covering the part of the current year served.** You must file your termination statement **within 60 days of leaving your position.**
4. **This paragraph applies only to candidates for office as a Town official.** A candidate for nomination or election to Town office must file the statement with the Board of Elections Supervisors and the Ethics Commission **for the calendar year immediately preceding the year in which the Petition of Candidacy is filed, and for the current calendar year in which the Petition of Candidacy is filed (i.e. January 1 through date of filing) together with that person's Petition of**

Candidacy. In each calendar year subsequent to the year in which the Candidacy Petition is filed, except in the year of the election, a statement covering the preceding calendar year shall be filed with the Ethics Commission on or before April 30th. In the year of the election, a statement covering the preceding calendar year shall be filed on or before April 30th or the last day for the withdrawal of candidacy, whichever is earlier. A candidate who fails to file a required statement and is provided written notice from the election board of the default shall be deemed to have withdrawn the candidacy if the statement is not filed within 20 days of receipt of the notice.

C. Where to File and Where to Get Forms.

- 1.** The forms are available at the Town Clerk's Office. **You should return the completed forms to the Town Clerk**, who will then return all of the forms to the Town's Ethics Commission.
- 2.** **This paragraph applies only in an election year.** A person filing this statement as a candidate for nomination or election to office must file the form with the Town's Board of Election Supervisors and with the Ethics Commission.

D. Glossary of Terms

1. Attributable Interest.

The law provides that certain property and business interests not directly held by a person may be attributed to him or her and must be reported on the financial disclosure statement. The circumstances under which attribution occurs are as follows:

- a. At any time during the reporting period, if you owned greater than the following equity interest in any business entity and that business entity holds a property or business interest which, if you owned it directly, you would be required to report on schedule a, b, or c, the interest is attributable to you and you must report it on the appropriate schedule:
 - (i) A business entity in which you held a (10)% or greater interest;
 - (ii) A business entity described in section (i) of this subsection in which the business entity held a 25% or greater interest;
 - (iii) A business entity described in section (ii) of this subsection in which the business entity held a 50% or greater interest; and
 - (iv) a business entity in which you directly or indirectly, through an interest in one or a combination of other business entities, hold a 10% or greater interest.

This limited attribution does not reduce or affect in any way the requirement for disclosure on Schedule A of real property held by a partnership, limited partnership or limited liability company even if the filer holds less than the referenced interest in the partnership.

- b. If your spouse or child holds a property or business interest which you would have to report on Schedule A, B, or C if you owned it directly, and if you exercised direct or indirect control over that interest at any time during the reporting period, the interest is attributable to you and must be reported on the appropriate Schedule.
- c. If at any time during the reporting period you (a) held a reversionary interest in a trust or estate or (b) were the beneficiary of a trust or estate or (c) were the settler of a revocable trust, then any interest held by the trust or estate which you would have to report on Schedule A, B, or C, if you owned it directly, it is attributable to you and must be reported on the appropriate Schedule. For purposes of this attribution provision, you are a beneficiary of a trust if you are a current income beneficiary, either receiving income or currently entitled to receive income, or if you have a current ownership or other interest in the corpus of the trust. Beneficiaries of an estate include immediate beneficiaries of an estate even if it is not settled. A trust, within the meaning of this section, does not include a common trust fund or a trust which forms part of a pension or profit-sharing plan that has more than 25 participants.

2. Unknown Information.

The law requires you to disclose interests and information "if known" for the calendar year for which the required statement is to be filed. If you claim not to know information requested on the form, state "unknown" in response to that question on the statement. Information in the public records or otherwise obtainable is not "unknown," and must be reported.

3. Blind Trust

A filer having an interest relating to a blind trust should contact the Commission about the filing requirements.

FORM INSTRUCTIONS

Identifying Information

If you wish to be notified if anyone requests to see your financial disclosure statement, check the appropriate box at the top of the page. Print or type your **complete name** and **address** where you can be sent correspondence. An address that you designate as a home address will not be disclosed to the public. Also **fill in the year of the reporting period**. Regular annual reports or reports by new officials will cover from January 1 through the last day of the **preceding calendar year**. Termination reports will cover from the first day of the current calendar year until your last day in your position. The last line of the general information block ("Office for which Authorization of Candidacy...") needs to be completed only during an election year and then only by individuals who are running for a Town elective office. Please include your Town e-mail address, if you have one. If you are required to disclose the name of a business in completing the form, you must disclose any other names that the business is trading as or doing business as.

Signature and Affirmation

You **must file the financial disclosure statement under oath or affirmation**, and willful and false filing is **subject to the penalties of perjury** as provided in § 9-101, Criminal Law Article, Annotated Code of Maryland. All forms filed **must therefore be signed and dated under oath or affirmation**. The Commission will not consider your financial disclosure statement to be filed until it is so signed and dated.

Checklist.

Complete by checking the "yes" or "no" box as to each statement. **Do not leave any statement unanswered**. Note that each statement corresponds to a Schedule. If you have questions as to the meaning of a statement, review the corresponding Schedule and instructions for a more detailed description of the interests involved.

SCHEDULE A. Real Property

Real property held by the filer or by a partnership, limited liability partnership, or limited liability company **in which the filer has an interest** must be disclosed, if it is held at any time during the reporting period. You must report real property whether it is located **in or outside of Maryland**. Partnership property must be disclosed, without regard to the extent of the filer's interest in the partnership. **You must also report any interest you have in leasehold property, for example, property in which you are tenant, including business offices and personal residences. You must report your personal residence if it is owned directly by you, attributable to you or rented by you.** Note also that all appropriate information (e.g., date, seller, etc.) must be reported for land you own whether or not you have constructed improvements on it.

Schedule A deals with real property interests only; do not report here your interests in business entities. If real property held by an entity is attributable to you, or is a partnership, limited liability partnership, or limited liability company property, list the real property on this Schedule. Report your interest in the entity on Schedule B, C, or H (whichever is appropriate) if it falls within the reporting requirements of those Schedules.

Please answer the Questions 1 through 11c as appropriate. The Ethics Law requires for each property to be disclosed that you give the location, the type of property, the nature and extent of your interest, the identity of other persons holding an interest in the property, encumbrances, date and manner of acquisition, the identity of the person from whom you acquired the property, and the nature and amount of consideration. Additionally if you transferred the property during the calendar year, the name of the person to whom you transferred the property, the portion of interest transferred and the amount of consideration received is required to be disclosed.

SCHEDULE B. Interests in Corporations/Partnerships

Report **all interests in any corporation, partnership, limited liability partnership or limited liability company** held by you during the reporting period, **whether or not the entity does business with the Town**. Examples of frequently disclosed items on this schedule are corporate stocks, corporate bonds, partnerships, and interests in mutual funds (**not** the individual holdings of the mutual funds and exchange traded funds). Filers are not required to disclose holdings in an Internal Revenue Service qualified trust or college savings plan. This would include the State of Maryland § 401(a), § 401(k) and § 457 (deferred compensation) plans. This would also include Maryland College Savings Plans, such as 529 investment accounts. Other possible qualified retirement accounts include 403(b) plans. The filer must determine whether the plan in which they

participate meets the requirements for exemption from disclosure. (See definition of “interest” in glossary of terms.)

Please answer the Questions 1 through 8C as appropriate. The Ethics Law requires for each interest to be disclosed that you give the name and address of the entity, the nature and extent of your interest, the amount of the interest, other interests held in the entity, and any encumbrances or conditions. Additionally, if the interest was acquired during the calendar year, the date and manner of acquisition, the identity of the person from whom you acquired the interest, and the nature and amount of consideration will need to be disclosed. **If the acquisition solely consists of an addition to an existing, publicly traded corporate interest acquired by dividend or dividend reinvestment is less than \$500, you need not provide any additional information.**

Finally, if you transferred the interest during the calendar year, the name of the person to whom you transferred the interest (if known), the portion of interest transferred and the amount of consideration received.

SCHEDULE C. Interests in Non-Corporate Business Entities

Report all interests in any **non-corporate business entity** not disclosed on Schedule B **that does business with the City**. A sole proprietorship is the type of entity that is included on this Schedule.

Please answer the Questions 1 through 6C as appropriate. The Ethics Code requires for each interest in any non-corporate business entity doing business with the Town that you give the name and address of the entity, the nature and extent of your interest, the amount of the interest, other interests held in the entity, and any encumbrances or conditions. Additionally, if the interest was acquired during the calendar year, the date and manner of acquisition, the identity of the person from whom you acquired the interest, and the nature and amount of consideration will need to be disclosed.

Finally, if you transferred the interest during the calendar year, the name of the person to whom you transferred the interest (if known), the portion of interest transferred and the amount of consideration received.

SCHEDULE D. Gifts You must report **each gift in excess of \$20 in value**, or **a series of gifts from any one person totaling \$100 or more**, received by you at any time during this reporting period or by any other person at your direction, **from or on behalf of**, directly or indirectly, any **person who does business with the Town or is regulated by the Town, or is registered or required to register as a lobbyist by the Ethics Code** for each gift, answer Questions 1 through 4. Generally, gifts received by members of your immediate family will be considered as gifts received by you for reporting purposes. You should note if the gift was received by a spouse or dependent child.

The following gifts need not be reported:

1. Gifts received from your spouse, domestic partner, children and parents.
2. Political campaign contributions regulated in accordance with the provisions of the Elections Law or any other provision of Town law regulating the conduct of elections or the receipt of political campaign contributions. Contributions to legal defense funds are generally considered to be gifts under the Ethics Law.

SCHEDULE E. Offices, Directorships, Salaried Employment, and Similar Interests

List on this schedule the name and address of the principal office of each business entity doing business with the Town in which, at any time during the reporting period, you or a member of your immediate family (spouse, domestic partner and dependent children) held an office, directorship, salaried employment, or similar interest. Also list any other similar interests (such as being a partner) held by you or a member of your immediate family during the reporting period, and not otherwise disclosed on this Schedule, in any business entity doing business with the Town. For example, the presidency of a corporation or a partnership in a law firm should be reported, as should employment as an engineer in a consulting firm that is a partnership. For each office, directorship, and employment to be disclosed, answer Questions 1 through 6.

SCHEDULE F. Debts

Report all **debts you owed** during the reporting period to **any entity doing business with the Town**. The Town Clerk maintains a list of entities doing business with the Town. **Exclude retail credit accounts** (which includes store and bank charge accounts). You must, however, include installment loans, mortgages, car loans, or other time-fixed **liabilities owed to an entity doing business with the Town**.

Please answer Questions 1 through 7 for each debt to be disclosed. The Ethics Law requires that you identify the person or entity to whom the debt is owed, the date the debt was incurred, the terms of payment of the debt, the amount of the debt owed as of the last day of the calendar year, the extent to which the principal amount of the debt increased or decreased during the calendar year, and a description of any security given for the debt. Additionally, if this transaction resulted in a debt being owed by your spouse or dependent child, you need to identify your spouse and/or child and describe the transaction.

SCHEDULE G. Family Members Employed by the Town

Please answer Questions 1 through 3 as appropriate listing all members of your **immediate family (spouse, domestic partner and dependent children)** who were **employed by the Town in any capacity at any time during the reporting period**. Include the name of the agency where employed.

SCHEDULE H. Employment and Business Ownership

Please answer Questions 1 and 2 as appropriate listing the **name and address of any places of employment and of business entities** wholly or partially owned by you, your spouse, domestic partner or a dependent child, and **from which income was earned during the reporting period whether or not the entity did business with the Town**. For example: salaried employment, individual consulting activities, private practices, and business activities involving income-producing real property. **With regard to dependent children, you need report only earned income from employment or an interest in a business entity if that employment or business entity was regulated by the Town.**

SCHEDULE I. Relationship with University of Maryland Medical System, State or local government, or quasi-governmental entity

You must report any and all relationships with UMMS, a governmental entity of the State or a local government in the State, or a **quasi-governmental** entity of the State or local government in the State. For each interest disclosed, including any **attributable** interest, please include the name of the agency, the services performed, and the consideration earned from the financial relationship. **For the purposes of this schedule, a relationship is defined as:**

Any receipt of compensation for representation of UMMS, a governmental entity of the State or a local government in the State, or a **quasi-governmental** entity of the State or local government in the State.
Any financial or contractual relationship, with UMMS, a governmental entity of the State or a local government in the State, or a **quasi-governmental** entity of the State or local government in the State.

Any transaction with UMMS, a governmental entity of the State or a local government in the State, or a **quasi-governmental** entity of the State or local government in the State, involving a monetary consideration.
The Commission will not provide public access to information related to consideration received from the relationships reported.

Schedule J. Optional

You may use this Schedule for any interest or transactions you have not been required to disclose on Schedule A through I but wish to disclose. This Schedule may also be used to further explain any prior entry.

****Alternate formats will be provided upon request for persons with disabilities**

TOWN OF UNIVERSITY PARK ETHICS COMMISSION
FINANCIAL DISCLOSURE STATEMENT

I would like to be notified if someone looks at my form.

Instructions:

1. Fill in the preliminary information requested in the box below. Be sure to verify the reporting period.
2. Upon completion of your financial disclosure statement, sign and date the lower portion of the page and make the required oath or affirmation.

This form must be filed on or before April 30 of each year during which an elected official holds office. This form must accompany any petition for candidacy filed under Section 506 of the Charter.

PLEASE PRINT OR TYPE

FIRST NAME	INITIAL	LAST NAME
CURRENT ADDRESS (<i>WHERE YOU CAN BE SENT CORRESPONDENCE</i>)		
OFFICE (OF INCUMBENT OR CANDIDATE)		
E-MAIL ADDRESS		

REPORTING PERIOD *January 1- December 31 of the year prior to filing.*

This financial disclosure statement describes all interests and related transactions and matters required to be disclosed by State Government Article, Title 15, Subtitle 6 of the Maryland Public Ethics Law and the Town's Ethics Code with respect to the period indicated and pertaining to the person filing the statement. The statement consists of this cover sheet, the checklist, and Schedules A through I.

I hereby make oath or affirm, under the penalties of perjury, that the contents of this financial disclosure statement, including the Schedules attached hereto, are complete, true and correct to the best of my knowledge, information and belief.

Signature of Person Filing: _____

(SEAL)

Date: _____

Instructions:

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.

Caution: Please read all instructions on accompanying instruction sheet including all definitions, before completing this form.

- A. I held interests during the reporting period in real property located in or outside Maryland. (If "Yes," complete Schedule A.)
- B. I held interests during the reporting period in corporations, partnerships and similar entities. (If "Yes," complete Schedule B.)
- C. I held interests during the reporting period in a non-corporate business entity which did business with the Town, other than a partnership. (If "Yes", complete Schedule C.)
- D. I received one or more gifts during the reporting period from person(s) doing business with the Town, regulated by the Town, 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 the reporting period in or with a business entity doing business with the Town. (If "Yes," complete Schedule E.)
- F. I or a member of my immediate family owed debts (excluding retail credit accounts) during the reporting period to persons doing business with the Town. (If "Yes," complete Schedule F.)
- G. A member of my immediate family was employed by the Town 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 other than the Town, 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.)

	YES	NO
A.		
B.		
C.		
D.		
E.		
F.		
G.		
H.		
I.		

FOR USE BY TOWN OFFICES ONLY

Received _____
Date

By _____
Town Clerk's Office

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 E 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 jointly, or by Tenants by the Entirety?

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. On 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)

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? _____

11.C. To whom did you transfer the interest? _____

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 Town? (You are not required to report a mutual fund that is publicly traded on a national scale unless the mutual fund is composed primarily of holdings of stocks and interests in a specific sector or area that is regulated by the Town.)

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 entity trade on a stock exchange?

Yes

No

If "no," give 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 E of Instructions for definition of "Attributable.")

Directly: _____ Attributable: _____

4. Do you hold the interest in your name alone, or 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: _____

Dollar Value of Shares: _____ or 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)

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) _____

8C. To whom did you transfer your interest in the entity? _____

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 Non-Corporate Business Entities Doing Business with the Town

Do you have an interest in any non-corporate business entity (i.e., a sole proprietorship) that did business with the Town 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 E of Instructions for the definition of "attributable.")

Direct: _____ Attributable: _____

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

Solely: _____ Jointly: _____

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

3.B. Dollar value of your interest in the entity: \$_____; or 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)

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) _____

6C. To whom did you transfer your interest in the entity? _____

If you have additional interests in sole proprietorship(s) that did business with the Town during the reporting period, please use additional sheet(s) if necessary, and answer each of the above questions for each additional entry.

Schedule D – Gifts

During the reporting period, did you receive any gift(s), directly or indirectly, in excess of a value of \$20, or a series of gifts from the same donor with a cumulative value of \$100 or more, from a person or entity who: 1) did business with the Town; 2) engaged in an activity that was regulated or controlled by the Town; or 3) was a regulated lobbyist? Gifts received from a member of the official's or employee's immediate family, including child or parent, 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?

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

3. What was the value of the gift?

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

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, domestic partner or dependent child) have any salaried employment, or hold any office or directorship, with an entity that did business with the Town?

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 Town department did the business entity do business? _____

6. What was the nature of the business? (Example: regulated by the Town, registered under the lobbying law, or involved with sales and contracts with the Town)

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 Town? **[NOTE: If, on Schedule A, B or C you listed a financial entity that did business with the Town 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. \$ _____

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 Town

During the reporting period, were any members of your immediate family (spouse, domestic partner or dependent child(ren)) employed by the Town 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 Town.)

1. What is the relation and name of the immediate family member employed by the Town?

2. What is the name of the department that employed the member of your immediate family?

3. What was the title of your immediate family member's position in the Town during the reporting period? _____

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

Schedule H – Employment/Business Ownership

During the reporting period, did you, or any member of your immediate family, receive any earned income from an entity other than the Town? 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 BY, or the authority of, the Town.

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, 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, 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 – Other

Is there any additional information or interest you would like to disclose?

STANDARDS OF CONDUCT

The Town of University Park Ethics Law includes standards of conduct applicable to financial disclosure filers and Town employees and appointed officials. The standards address disqualification from participation, prohibited secondary employment, prohibited ownership interests, misuse of position, prohibited solicitation and acceptance of gifts, misuse of confidential information, post-employment limitations, prohibited dealings with the Town, and procurement specifications assistance restrictions. The Law provides for exceptions and exemptions under certain circumstances.

Filers wanting more detailed information about these requirements should contact the Town Ethics Commission.

PRIVACY NOTICE

The Public Ethics Law (State Government Article, Title 15), Annotated Code of Maryland) and the Town Ethics Code require the collection of this information, which will be used primarily for public disclosure and to determine compliance with the Law. The information may be disclosed to any requesting person, including officials of State, local or federal government, who record their name and address, and this record will be provided to the filer upon request. The subject has the right to review, correct and amend the record.