

TOWN OF BEL AIR CODE OF ETHICS
Financial Disclosure Statement - Town Employees and Officials

Upon completion of the financial disclosure statement, sign and date where required, and submit the documents to the Town Clerk or a member of the Bel Air Ethics Commission.

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

Regular Reporting Period: January 1st through December 31st of 2023

Or

Termination Report: January 1st through _____ of _____

Please print or type

| | | |
|----------------|----------------------|---------------|
| First Name | Initial | Last Name |
| Street Address | | |
| City | State | Zip Code |
| Job Title | Department or Office | Email Address |

This financial disclosure statement describes all interests and related transactions and matters required to be disclosed by the Town Code, Chapter 43, Code of Ethics, with respect to the period indicated and pertaining to the person filing the statement.

I acknowledge that any information required by the Town Code, Chapter 43, Code of Ethics, that becomes reportable after the statement is filed, shall be reported immediately to the Town of Bel Air's Ethics Commission, as required by law.

I hereby 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

Date Completed

Signature of Town Clerk or Ethics Commission Member

Date Received

TOWN OF BEL AIR CODE OF ETHICS

Financial Disclosure Statement - Town Employees and Officials

Name: _____

Instructions: Read the Code of the Town of Bel Air, Chapter 43 - Code of Ethics (available online at www.belairmd.org). Contact the Town Clerk if you have any questions or concerns. Sign the acknowledgement of understanding below and proceed to complete the corresponding schedule of questions A - K and Schedule X: Other.

Code of the Town of Bel Air - Chapter 43 - Code of Ethics

Financial Disclosure Schedule A - K and Schedule X: Other

Schedule A: Real Property

Schedule B: Securities

Schedule C: Ownership in Business Entities

Schedule D: Gifts

Schedule E: Debts and Liabilities

Schedule F: Employment and Offices Held

Schedule G: Spouse

Schedule H: Dependent Children

Schedule I: Relationship with State or Local Government, Quasi-Governmental Entity or University of Maryland Medical System (UMMS)

Schedule J: Clients Represented before the Bel Air Board of Town Commissioners

Schedule K: Businesses Regulated by the Town of Bel Air

Schedule X: Other

Note: Pursuant to §43-6(g) of the Town of Bel Air Code of Ethics, an individual who is required to disclose the name of a business on any schedule of this financial disclosure statement shall disclose any other names that the business is trading as or doing business as.

Acknowledgement

I have read and understood the above-mentioned Code of the Town of Bel Air, Chapter 43 - Code of Ethics. I willingly agree to abide by the Town Code and to uphold its standards. I understand that any violation of this regulation perpetrated by me will be subject to review by the Ethics Commission and I may face consequences that may include penalties up to and including disciplinary or other appropriate personnel action, including termination, removal from office, suspension of salary, or other sanctions, both civil and/or criminal.

Name (Please Print)

Signature

Date

TOWN OF BEL AIR CODE OF ETHICS

Financial Disclosure Statement - Town Employees and Officials

Questions & Answers (Q & A)

The Town of Bel Air Code of Ethics is available online at www.belairmd.org.

Q: What is an attributable interest?

A: An attributable interest is:

1. 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;
2. An interest held, at any time during the applicable period, by:
 - a. a business entity in which the individual held a 10% or greater interest;
 - b. a business entity described in item (a) of this item in which the business entity held a 25% or greater interest;
 - c. a business entity described in item (b) of this item in which the business entity held a 50% or greater interest; and
 - d. a business entity in which the individual directly or indirectly, through an interest in one or a combination of other business entities, holds a 10% or greater interest; and
3. A trust or an estate in which, at any time during the applicable period, the individual held a reversionary interest, was a beneficiary, or if a revocable trust, was a settlor.

Q: I don't know from whom I purchased my property, where can I find this?

A: You may inquire with the state and local government where the property resides. For example, Maryland property records are held with the Department of Assessments and Taxation at:
<https://sdat.dat.maryland.gov/RealProperty/Pages/default.aspx>.

Q: Does my property generate income?

A: If the property took in revenue, even if it operated at a net loss, it is considered to have generated income. Examples include rented properties or homeshares such as Airbnb or VRBO.

Q: What is sector specific?

A: Funds comprised of stocks and other investment holdings from a specific sector (e.g. technology, healthcare, energy, utilities, and telecommunications) which are regulated by YOUR governmental unit.

Q: What is the purchase price or “value” of a security?

A: The fair market value at the time of acquisition?

Q: What is considered doing business with the Town of Bel Air?

A: Entity that is:

1. a party to one of more sales, purchases, leases, or contracts with the Town of Bel Air totaling at least \$5,000 during the filing year, regardless of when the payment is actually made; or
2. a registered lobbyist regulated by the Town of Bel Air Ethics Board; or
3. regulated by your agency/governmental unit
4. Not a part of the Town of Bel Air

Q: Where can I find this information?

A: You may contact the Town Clerk at (410) 638-4550.

Q: What is the purchase price or “value” of an interest in an entity?

A: The fair market value at the time of acquisition?

Q: What is a gift?

A: Review Bel Air Town Code Chapter 34 Code of Ethics online at www.belairmd.org.

Q: What is a debt?

A: Review Bel Air Town Code Chapter 34 Code of Ethics online at www.belairmd.org.

Schedule A: Real Property

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: You must report all your real property interests, whether leased or owned, wherever located, and held at any time during the reporting period. This includes property sold or transferred. Please answer all questions related to each property disclosure, as all fields are mandatory in each of the interest questionnaires.

You must disclose:

1. Property owned directly, both commercial and residential.
2. Property leased or rented as a tenant, both commercial and residential.
3. A place of residence without formal agreement if you provided any monetary contributions to the household.
4. Property owned jointly or through a partnership, limited liability partnership, or limited liability company in which you held an interest.

Special Designations

You may designate only one property as a principal home and one property as a designated second home. The address information attached to these properties will be redacted from any public disclosure. A principal home is the sole residential property that you occupy as your primary residence, whether owned or rented by you. A designated second home is a residential property that you occupy for some portion of the filing year and is not rental property or a timeshare.

During the reporting period of 2021 did you own or rent real property as described above, in Maryland or any other state or country? This includes monetary contributions to household expenses without a formal lease.

Yes No

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Interest A.1

What type of property is it?

- | | |
|--|---|
| <input type="checkbox"/> Principal Home | <input type="checkbox"/> Designated Second Home |
| <input type="checkbox"/> Commercial Property | <input type="checkbox"/> Property Rented to Others |
| <input type="checkbox"/> Timeshare | <input type="checkbox"/> Vacation of Other Home |
| <input type="checkbox"/> Vacant Land | <input type="checkbox"/> Sold, Transferred or Gifted Property |

If sold, transferred, or gifted property, what type of property is it?

- | | |
|--|--|
| <input type="checkbox"/> Principal Home | <input type="checkbox"/> Designated Second Home |
| <input type="checkbox"/> Commercial Property | <input type="checkbox"/> Property Rented to Others |
| <input type="checkbox"/> Timeshare | <input type="checkbox"/> Vacation of Other Home |
| <input type="checkbox"/> Vacant Land | |

Domestic International - If International, What Country? _____Street Address (or legal description):

Note: Principal and Designated Second Home addresses will be redacted from public viewing.

Schedule A: Real Property

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

City _____

State _____

Zip _____

Is the interest held directly by you or attributable* to you?

Directly by you Attributable to you

How did you obtain the property?

- Purchase
- Gift
- Monetary Contributions to Household
- Rent/Lease
- Inheritance

Please explain your monetary contribution to the household in which you resided during the reporting period.

N/A or explain monetary contribution: _____

From whom* did you purchase/receive/inherit the property? _____

What year did you purchase/receive/inherit the property? _____

What year did the position begin? _____ Or check this box if Prior to 2004.

What was the purchase price or market value of the property when it was gifted/inherited?

- Below \$25,000 \$25,000 - \$49,000 \$50,000 - \$74,999 \$75,000 - \$99,999 \$100,000 - \$124,999
- \$125,000 - \$149,000 \$150,000 - \$174,999 \$175,000 - \$199,000 \$200,000 - \$249,000 \$250,000 - \$299,999
- \$300,000 - \$349,999 \$350,000 - \$499,999 \$500,000 - \$749,999 \$750,000 - \$999,999
- \$1,000,000 - \$1,999,999 \$2,000,000 - \$4,999,999 \$5,000,000 - \$9,999,999 \$10,000,000 and over

Did you own the property by yourself or with others?

- Solely
- With someone other than my spouse
- With my spouse
- Through a Partnership, LLC, or LLP where you have interest.

Name of joint owner or entity: _____

Schedule A: Real Property

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Did you have a mortgage, home equity loan, second mortgage, liens, or any other encumbrances on the property?

Yes No

If yes, name of Lender or Lien Holder: _____

Does the property generate income* for your household? Yes No

If you sold this property during the reporting period, you must answer the following questions:

Who did you sell the property to? _____ - N/A

What percent of the property did you sell?

Under 3% 3 - 9% 10 - 24% 25 - 49% 50 - 74% 75 - 99% 100% - N/A

What month did you sell the property? _____ - N/A

How much did you receive for the property?

Below \$25,000 \$25,000 - \$49,000 \$50,000 - \$74,999 - \$75,000 - \$99,999 \$100,000 - \$124,999

\$125,000 - \$149,000 \$150,000 - \$174,999 \$175,000 - \$199,000 \$200,000 - \$249,000 \$250,000 - \$299,999

\$300,000 - \$349,999 \$350,000 - \$499,999 \$500,000 - \$749,999 \$750,000 - \$999,999

\$1,000,000 - \$1,999,999 \$2,000,000 - \$4,999,999 \$5,000,000 - \$9,999,999 \$10,000,000 and over - N/A

###

Complete another Schedule A for each additional property.

*See Q & A for additional information and guidance.

Schedule B: Securities

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: You must report each security (stocks, bonds and specified mutual funds or exchange traded funds) you held in a corporation, partnership, limited liability partnership (LLP), or limited liability company (LLC) during the reporting period, WHETHER OR NOT that entity did business with the Town of Bel Air. Please answer all questions related to each security disclosed.

You must disclose:

- Shares of stock you own directly or as part of an Individual Retirement Account (IRA), including a Roth IRA.
- Bonds issued by corporate entities.
- Mutual funds and exchange-traded funds (ETFs), ONLY IF they consist primarily of holdings and stock interests in a specific sector regulated by your Town of Bel Air governmental unit or department.

You are not required to disclose:

1. A bank account or certificate of deposit (CD).
2. A money market fund.
3. An insurance policy or an annuity contract.
4. Bonds issued by government entities.
5. An IRS defined pension or profit-sharing plan or college savings plan such as 401(a), 401(k), 403(b), 457(b) that has more than 25 participants.
6. A mutual fund or exchange-traded fund (ETF) **UNLESS** identified as sector-specific* in relation to an area regulated by your Town of Bel Air governmental unit or department.
7. An interest held in the capacity of a personal representative, agent, custodian, fiduciary, or trustee, unless you have an equitable interest therein.

During the reporting period, did you own any stocks, bonds, or sector-specific mutual funds or ETFs that satisfy the disclosure requirements described above? Yes No

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Option to include a financial statement: You may opt to attach a statement that contains your reportable interests, instead of, or in addition to filling out the interest questionnaire below. Please ensure the document is a year-end statement showing all activity that occurred during the reporting period. A statement containing activity over the course of a month (e.g. December statement) cannot be accepted. Please make sure your personal information (i.e. social security number, account number, etc.) is redacted or blocked out before you submit.

Interest B.1

What type of security is this?

- | | |
|--|---|
| <input type="checkbox"/> Stock | <input type="checkbox"/> Bond |
| <input type="checkbox"/> Sector-Specific Mutual Fund | <input type="checkbox"/> Sector-Specific Exchange-Traded Fund |

Name of the security: _____

Is the security held directly by you or attributable* to you? Directly by you Attributable to you

Schedule B: Securities

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Is the security publicly traded? Yes No

If not publicly traded, provide address below:

Domestic International - If International, What Country? _____

Street Address _____

City _____

State _____

Zip _____

Did you own the security solely, or was it held jointly with another?

- Solely
- With my Spouse
- With someone other than my spouse
- Through a Partnership, LLC or LLP where you have interest.

If applicable, name of joint owner: _____

What is the value of the security (select dollar value or number of shares, not both, and select the appropriate box)?

- Dollar value
 - under \$1,000 \$1,000 - \$4,999 \$5,000 - \$9,999 \$10,000 - \$14,999 \$15,000 - \$19,999
 - \$20,000 - \$24,999 \$25,000 - \$49,999 \$50,000 - \$74,999 \$75,000 - \$99,999 \$100,000 and over
- Number of shares
 - under 100 100 - 249 249 - 499 500 - 749 750 - 999 1,000 and over

Did you hold the security free and clear of any lien, pledge, charge, interest, claim or right of another, or any other encumbrance? Yes No

If no, please list below the name(s) of each lender, creditor, lien holder, etc.

Schedule B: Securities

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Did you acquire the security during the reporting period? Yes No

If yes, from whom did you acquire the security? _____

How was the security acquired?

- Purchase
- Gift
- Exchange
- Reinvested Dividend
- Inheritance
- Other

What month was it acquired? _____

What was the purchase price or value* of the security?

- under \$1,000 \$1,000 - \$4,999 \$5,000 - \$9,999 \$10,000 - \$14,999 \$15,000 - \$19,999
- \$20,000 - \$24,999 \$25,000 - \$49,999 \$50,000 - \$74,999 \$75,000 - \$99,999 \$100,000 and over

Did you sell or transfer all, or part of your security during the reporting period? Yes No

If yes, to whom did you sell/transfer your interest in the security?

What percent of the security was sold or transferred?

- Under 3% 3 - 9% 10 - 24% 25 - 74% 75 - 99% 100% - N/A

What was the selling price or value* of the interest?

- under \$1,000 \$1,000 - \$4,999 \$5,000 - \$9,999 \$10,000 - \$14,999 \$15,000 - \$19,999
- \$20,000 - \$24,999 \$25,000 - \$49,999 \$50,000 - \$74,999 \$75,000 - \$99,999 \$100,000 and over - N/A

What month did you sell/transfer? _____ - N/A

###

Complete another Schedule B for each additional Security.

*See Q & A for additional information and guidance.

Schedule C: Ownership in Business Entities

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: You must report each interest you held during the reporting period, in business entities that you owned in whole or part, directly or indirectly, jointly, and severally, WHETHER OR NOT that entity did business with the Town of Bel Air. Pursuant to §43-6(g) of the Town of Bel Air Code of Ethics, an individual who is required to disclose the name of a business under this section shall disclose any other names that the business is trading as or doing business as. This schedule concerns the reporting of ownership in business entities, other than stocks (which are reported on schedule B).

You must disclose ownership in a:

1. Corporation
2. Partnership
3. Limited liability partnership (LLP)
4. Limited liability company (LLC)
5. Sole proprietorship

You are not required to disclose ownership in a sole proprietorship if:

1. The entity did not do business with the Town of Bel Air; AND
2. You did not earn an income from the entity.

(Note: if your business took in revenue, even if it operated at a net loss, you must report the interest here)

During the reporting period, did you wholly or partially own any business entity that satisfies the disclosure requirements above? Yes No

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Interest C.1

What type of business entity is this?

- | | |
|--|--|
| <input type="checkbox"/> Corporation | <input type="checkbox"/> Limited Liability Company (LLC) |
| <input type="checkbox"/> Partnership | <input type="checkbox"/> Sole Proprietorship |
| <input type="checkbox"/> Limited Liability Partnership (LLP) | |

Name of the business entity: _____

Domestic International - If International, What Country? _____

Street Address _____

City _____

State _____

Zip _____

Is the entity held directly by you or attributable* to you? Directly by you Attributable to you

Schedule C: Ownership in Business Entities
Town of Bel Air Employees and Officials
Reporting Period: January 1st - December 31st of 2023

Name: _____

Did you own the entity solely, or with others?

- Solely
- With my Spouse
- With someone other than my spouse
- Through a Partnership, LLC or LLP where you have interest.

What is the value of the entity?

- Below \$25,000
- \$25,000 - \$49,000
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$124,999
- \$125,000 - \$149,000
- \$150,000 - \$174,999
- \$175,000 - \$199,000
- \$200,000 - \$249,000
- \$250,000 - \$299,999
- \$300,000 - \$349,999
- \$350,000 - \$499,999
- \$500,000 - \$749,999
- \$750,000 - \$999,999
- \$1,000,000 - \$1,999,999
- \$2,000,000 - \$4,999,999
- \$5,000,000 - \$9,999,999
- \$10,000,000 and over -
- N/A

What percentage of the entity is held by you?

- Under 3%
- 3 - 9%
- 10 - 24%
- 25 - 49%
- 50 - 74%
- 75 - 99%
- 100%

Did the entity do business* with the Town of Bel Air? Yes No

If yes, how did the entity do business with the Town of Bel Air?

- Involved in Sales & Contracts with the Town of Bel Air
- Regulated by "My" Town of Bel Air Agency or Department
- Registered under the Lobbying Law
- Regulated by "My" Town of Bel Air Agency or Department and Involved in Sales and Contracts

Please list below each Town of Bel Air agency, unit, or department with which the entity did business:

Did you hold your interest in the entity free and clear of any lien, pledge, charge, security interest, claim, right by another, or any other encumbrance? Yes No

If no, please list below the name(s) of each lender, creditor, lien holder, etc.

Did you acquire an interest in the entity during the reporting period? Yes No

Schedule C: Ownership in Business Entities
Town of Bel Air Employees and Officials
Reporting Period: January 1st - December 31st of 2023

Name: _____

If yes, how was the interest acquired?

- Purchase
- Gift
- Exchange
- Reinvested Dividend
- Inheritance
- Other

What month was it acquired? _____

From whom did you acquire the interest in the entity? _____

What was the purchase price or value* of the interest?

- under \$1,000 \$1,000 - \$4,999 \$5,000 - \$9,999 \$10,000 - \$14,999 \$15,000 - \$19,999
- \$20,000 - \$24,999 \$25,000 - \$49,999 \$50,000 - \$74,999 \$75,000 - \$99,999 \$100,000 and over

Did you sell or transfer, all, or part of your interest in the entity during the reporting period? Yes No

To whom did you sell or transfer your interest? _____

What percent of the interest was sold or transferred?

- Under 3% 3 - 9% 10 - 24% 25 - 49% 50 - 74% 75 - 99% 100% - N/A

What were you paid for the interest you sold or transferred?

- under \$1,000 \$1,000 - \$4,999 \$5,000 - \$9,999 \$10,000 - \$14,999 \$15,000 - \$19,999
- \$20,000 - \$24,999 \$25,000 - \$49,999 \$50,000 - \$74,999 \$75,000 - \$99,999 \$100,000 and over - N/A

In which month was the interest sold or transferred? _____ - N/A

###

Complete another Schedule C for each additional Business Entity Owned.

*See Q & A for additional information and guidance.

Schedule D: Gifts

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: You must report each gift you received during the reporting period, along with all gifts given to another person at your direction. You are not required to report a gift received from a member of your immediate family or your parent(s), or any kind of political campaign contributions. Please answer all questions related to each gift or attach a listing of all your gifts with their complete description.

You must disclose gifts with a value of more than \$20, or multiple gifts from the same donor if the gifts had a cumulative value of \$100 or more. Include gifts from:

1. A regulated lobbyist;
2. An entity engaged in activity regulated or controlled by the Town of Bel Air;
3. An entity that otherwise did business with the Town of Bel Air; or
4. An association or any entity acting on behalf of an association that is engaged only in representing counties or municipal corporations.

For Elected & Appointed Officials ONLY:

You need not disclose if you attended a special meal or reception to which a qualifying legislative unit (i.e., all members, a standing board, committee, or commission, a local or regional delegation officially designated for disclosure purposes by the presiding officers) was invited, and the meal/beverage was consumed in the presence of the donor or sponsor.

During the reporting period, did you receive any gifts or were any gifts given to another person at your direction that satisfy the disclosure requirements described above? Yes No

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Option to attach a list of gifts: You may opt to attach a list that contains your reportable gifts, instead of, or in addition to filling out a gift questionnaire for each individual gift. Please ensure your document contains a complete listing of each reportable gift, and you must include the following details: **the kind of gift, description, who gave you the gift, the dollar value, and name of recipient (if the gift was given to someone else at your direction).**

Interest D.1

What type of gift was it?

- | | | | |
|--|--|--|----------------------------------|
| <input type="checkbox"/> Award | <input type="checkbox"/> Entertainment | <input type="checkbox"/> Meal & Beverage | <input type="checkbox"/> Tickets |
| <input type="checkbox"/> Cash | <input type="checkbox"/> Gift Card | <input type="checkbox"/> Plaque | <input type="checkbox"/> Other |
| <input type="checkbox"/> Conference Expenses | <input type="checkbox"/> Honorarium | <input type="checkbox"/> Reception | |

Please describe the gift: _____

Who gave the gift? _____

What was the dollar value of the gift? \$ _____

Was the gift given to someone else at your direction? Yes No

Name of the recipient: _____

###

Complete another Schedule D for each additional Gift.

Schedule E: Debts and Liabilities
Town of Bel Air Employees and Officials
Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: You must report any debt owed during the reporting period, to entities which did business with, or were regulated by the Town of Bel Air. Please answer all questions related to each interest and be sure to include each mortgage listed on Schedule A, if the holder of the mortgage fits these criteria.

You must disclose:

1. Debts you owe to entities, if they did business by sales, purchases, contract, or lease of at least \$5,000 with the Town of Bel Air during the reporting period.
 - a. Typical debts to report are installment loans, mortgages, car loans or other time-fixed liabilities owed to financial institutions such as banks, credit unions, mortgage companies and similar entities.
 - b. Other reportable debts could include those owed to other entities, including merchants, contractors, etc.
2. Debts you owe to entities if the entity was regulated by or did business with the Town of Bel Air Example: filers must disclose mortgages owed to financial institutions doing business with the Town of Bel Air.
3. Debts you owe to regulated lobbyists.
4. Debts your spouse owes, ONLY IF you were involved in the transaction that gave rise to the debt.
5. Debts your dependent children owe, ONLY IF you were involved in the transaction that gave rise to the debt.

You are not required to disclose:

1. Consumer credit card accounts
2. Debts and liabilities that are not associated with entities that did business with or were regulated by the Town of Bel Air.

Who did business with the Town of Bel Air?

To assist you in reporting this information, the Town of Bel Air Department of Finance will provide a list of financial institutions that did business with the Town of Bel Air during the reporting period. If it has not already been made available to you, please contact the Town Clerk for this information.

During the reporting period, did you have any debts owed to entities that did business with, or were regulated by the Town of Bel Air? Yes No

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Interest E.1

What is the type of debt or liability?

- | | | | |
|---|---------------------------------------|--|---|
| <input type="checkbox"/> Mortgage | <input type="checkbox"/> Vehicle Loan | <input type="checkbox"/> Personal Loan | <input type="checkbox"/> Line of Credit |
| <input type="checkbox"/> Home Equity Loan | <input type="checkbox"/> Student Loan | <input type="checkbox"/> Commercial Loan | <input type="checkbox"/> Other |

To whom did you owe the debt? _____

What year was the debt incurred? _____ Or check this box if Prior to 2004.

What is the interest rate? Under 5% 5% - 7.5% 7.5% - 10% More than 10%

What are the payment terms? Biweekly Monthly Interest Only Quarterly Semi-Annually Annually

Schedule E: Debts and Liabilities
Town of Bel Air Employees and Officials
Reporting Period: January 1st - December 31st of 2023

Name: _____

What is the amount of debt at the end of the reporting period?

- under \$1,000 \$1,000 - \$4,999 \$5,000 - \$9,999 \$10,000 - \$14,999 \$15,000 - \$19,999
 \$20,000 - \$24,999 \$25,000 - \$49,999 \$50,000 - \$74,999 \$75,000 - \$99,999 \$100,000 and over

Did the principal balance of the debt change?

- No change to principal. Principal balance decreased.
 Principal balance increased. Principal balance was paid off.

By how much?

- under \$1,000 \$1,000 - \$4,999 \$5,000 - \$9,999 \$10,000 - \$14,999 \$15,000 - \$19,999
 \$20,000 - \$24,999 \$25,000 - \$49,999 \$50,000 - \$74,999 \$75,000 - \$99,999 \$100,000 and over

Was any collateral given for the debt? Yes No

Please select the type of collateral given: Home Vehicle Boat Student Loan Other

If other, please describe: _____

Was this a transaction in which you were involved, and resulted in a debt being owed by your spouse or dependent child?
Yes No

Relation: Spouse Dependent Child

Name: _____

Describe the Transaction: _____

###

Complete another Schedule E for each Debt or Liability.
***See Q & A for additional information and guidance.**

Schedule F: Employment and Offices Held
Town of Bel Air Employees and Officials
Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: Excluding your employment with the Town of Bel Air, you must report any offices, directorships or salaried employment you held during the reporting period. Please answer all questions related to each position disclosed.

You must disclose:

1. Any outside employment where you earned a salary, WHETHER OR NOT your employer did business with the Town of Bel Air.
2. Any unsalaried positions you held, such as an officer or director of a for-profit or not-for-profit organization, but ONLY IF the entity did business with the Town of Bel Air.

During the reporting period, did you hold any offices, directorships, or salaried employment that satisfies the disclosure requirements above? Yes No

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Interest F.1

Your position title:

- | | | | | |
|-----------------------------------|--|---------------------------------------|---|--------------------------------|
| <input type="checkbox"/> Employer | <input type="checkbox"/> Limited Partner | <input type="checkbox"/> Board Member | <input type="checkbox"/> President | <input type="checkbox"/> CEO |
| <input type="checkbox"/> Employee | <input type="checkbox"/> Director | <input type="checkbox"/> Treasurer | <input type="checkbox"/> Vice President | <input type="checkbox"/> CFO |
| <input type="checkbox"/> Partner | <input type="checkbox"/> Officer | <input type="checkbox"/> Chairperson | <input type="checkbox"/> CIO | <input type="checkbox"/> Other |

If other, please describe: _____

Did you have an ownership interest in the entity during the reporting period?

- Wholly Owned Partially Owned N/A

What year did the position begin? _____ Or check this box if Prior to 2004.

Name of entity: _____

Domestic International - If International, What Country? _____

Street Address _____

City _____

State _____

Zip _____

Schedule F: Employment and Offices Held
Town of Bel Air Employees and Officials
Reporting Period: January 1st - December 31st of 2023

Name: _____

Did the entity do business* with the Town of Bel Air? Yes No

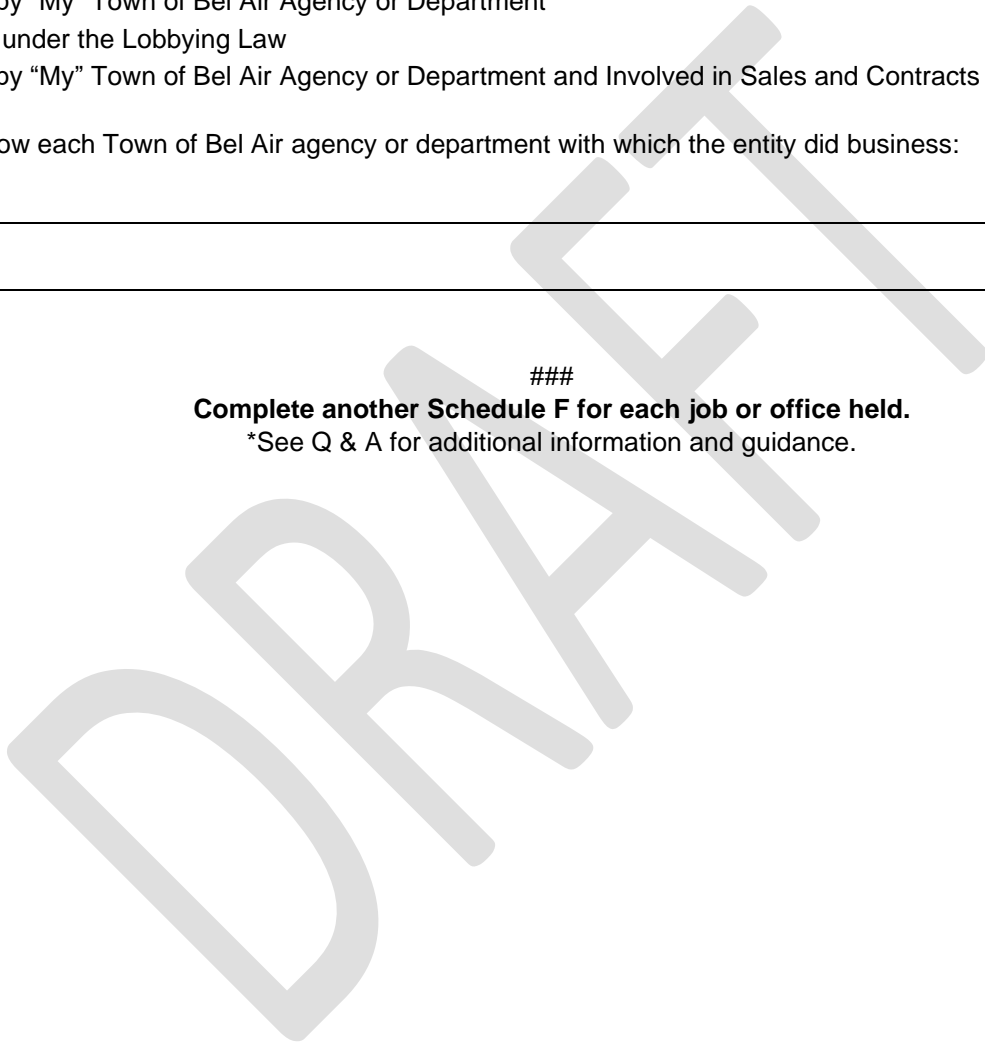
If yes, how did the entity do business with the Town of Bel Air?

- Involved in Sales & Contracts with the Town of Bel Air
- Regulated by "My" Town of Bel Air Agency or Department
- Registered under the Lobbying Law
- Regulated by "My" Town of Bel Air Agency or Department and Involved in Sales and Contracts

Please list below each Town of Bel Air agency or department with which the entity did business:

###

Complete another Schedule F for each job or office held.
*See Q & A for additional information and guidance.



Schedule G: Spouse

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: You must report each place of salaried employment held by your spouse during the reporting period, WHETHER OR NOT your spouse's employer did business with the Town of Bel Air. You must also report unsalaried offices, directorships, or similar positions for your spouse with any entity that did business with the Town of Bel Air. You must also report any solely or partially owned business from which your spouse earned income.

Note: If your spouse's business took in revenue, even if it operated at a net loss, it is considered to have earned income

Lobbying Disclosure: If your spouse was a regulated lobbyist with the Town of Bel Air during the reporting period, you must also identify each client that engaged your spouse for lobbying purposes.

During the reporting period of 2022, did you have a spouse who had any of the above employment or business interests? Yes No

I hereby affirm that I have no interests to disclose on this schedule, because I do not have a spouse.

I hereby affirm that I have no interests to disclose on this schedule, because my spouse is not employed and does not own a business.

_____ Initial to affirm selection above.

Name of Spouse: _____

Interest G.1

Spouse's position title:

- | | | | | |
|-----------------------------------|--|---------------------------------------|---|--------------------------------|
| <input type="checkbox"/> Employer | <input type="checkbox"/> Limited Partner | <input type="checkbox"/> Board Member | <input type="checkbox"/> President | <input type="checkbox"/> CEO |
| <input type="checkbox"/> Employee | <input type="checkbox"/> Director | <input type="checkbox"/> Treasurer | <input type="checkbox"/> Vice President | <input type="checkbox"/> CFO |
| <input type="checkbox"/> Partner | <input type="checkbox"/> Officer | <input type="checkbox"/> Chairperson | <input type="checkbox"/> CIO | <input type="checkbox"/> Other |

If other, please describe: _____

What year did the position begin? _____ Or check this box if Prior to 2004.

Did your spouse have an ownership interest in that entity during 2022?

- Wholly Owned Partially Owned N/A

Name of entity: _____

Domestic International - If International, What Country? _____

Schedule G: Spouse

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Street Address _____

City: _____

State: _____

Zip: _____

Did the entity do business* with the Town of Bel Air? Yes No

If yes, how did the entity do business with the Town of Bel Air?

- Involved in Sales & Contracts with the Town of Bel Air
- Regulated by "My" Town of Bel Air Agency or Department
- Registered under the Lobbying Law
- Regulated by "My" Town of Bel Air Agency or Department and Involved in Sales and Contracts

Please list below each Town of Bel Air agency or department with which the entity did business:

During the reporting period of 2022, was your spouse an individual regulated lobbyist? Yes No

If yes, provide the name(s) of each client that engaged your spouse during 2022 for lobbying purposes.

###

Complete another Schedule G for each position.

*See Q & A for additional information and guidance.

Schedule H: Dependent Children
Town of Bel Air Employees and Officials
Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: You must report each place of salaried employment held by your dependent children during the reporting period, subject to the conditions below. You must also report unsalaried offices, directorships, or similar positions for your dependent children with any entity that did business with the Town of Bel Air. You must also report any solely or partially owned business from which your children earned income.

Note: If your dependent children's business took in revenue, even if it operated at a net loss, it is considered to have earned income

The statement may not include a minor child's employment or business interests unless the employment or business interests are with:

1. The Town of Bel Air;
2. An entity regulated by your governmental unit or department;
3. An entity that has contracts in excess of \$10,000 with your governmental unit or department

During the reporting period of 2022, did you have dependent children who had any of the employment or business interests described above? Yes No

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Interest H.1

Name of the dependent child: _____

Title or position: _____

What year did the position begin? _____ Or check this box if Prior to 2004.

Did your child have an ownership interest in that entity during the reporting period?

- Wholly Owned Partially Owned N/A

Name of entity: _____

Domestic International

Street Address: _____

City: _____

Country: _____

State: _____

Zip: _____

Schedule H: Dependent Children
Town of Bel Air Employees and Officials
Reporting Period: January 1st - December 31st of 2023

Name: _____

Did the entity do business* with the Town of Bel Air? Yes No

If yes, how did the entity do business with the Town of Bel Air?

- Involved in Sales & Contracts with the Town of Bel Air
- Regulated by "My" Town of Bel Air Agency or Department
- Registered under the Lobbying Law
- Regulated by "My" Town of Bel Air Agency or Department and Involved in Sales and Contracts

Please list below each Town of Bel Air agency or department with which the entity did business:

###

Complete another Schedule H for each dependent child.

*See Q & A for additional information and guidance.

Schedule I: Relationship with State or Local Government, Quasi-Governmental Entity or University of Maryland Medical System (UMMS)

Town of Bel Air Employees and Officials

Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: 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:

1. 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.
2. 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.
3. 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.

During the reporting period, did you have any 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?

Yes **No**

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Interest I.1

Identify either the 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, or UMMS with which you have a financial relationship?

Describe the position of employment, services performed, description of and subject matter of the relationship or details of transaction entered into.

What consideration was received? \$ _____

Note: The consideration will be redacted from public viewing.

###

Complete another Schedule I for each relationship.

*See Q & A for additional information and guidance.

Schedule J: Clients Represented before the Bel Air Board of Town Commissioners

Town of Bel Air Elected Officials Only

Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: Other than a judicial proceeding or quasi-judicial proceeding, you must report the required information regarding any of the following activities during the reporting period:

1. You received compensation to represent a client before the Bel Air Board of Town Commissioners
2. You assisted a client of yours in seeking a Town of Bel Air government contract, license or other competitive award AND you received or expect to receive, a direct financial benefit as a result of the award of the contract, license, or other competitive award.
3. You assisted a business entity in which you have an ownership interest in seeking a Town of Bel Air contract, license or other competitive award AND you received or expect to receive a direct financial benefit as a result of the award of the contract, license, or other competitive award.

During the reporting period, other than in a judicial or quasi-judicial proceeding (which need not be reported), did you have any reportable activity that satisfies the disclosure requirements above? Yes No

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Interest J.1

Type of activity:

- Direct Financial Compensation for Representation
- Assist in seeking a Government Contract
- Assist in seeking a License
- Assist in seeking a Competitive Award

Client name: _____

Before which Town of Bel Air agency did you represent the business entity or client of yours?

Briefly describe the services performed:

###

Complete another Schedule J for each client.
*See Q & A for additional information and guidance.

Schedule K: Businesses Regulated by the Town of Bel Air

Town of Bel Air Elected Officials Only

Reporting Period: January 1st - December 31st of 2023

Name: _____

Instructions: You must report any business enterprise subject to regulation by the Town of Bel Air in which you, your spouse, or dependent children, together or separately, have one of the following interests:

1. Any interest in a partnership, limited liability partnership, or limited liability company
2. The lesser of 10 percent (10%) or more of the capital stock of any corporation; OR capital stock of any corporation with a cumulative value of \$35,000 or more

During the reporting period of 2022, did you or any member of your immediate family, together or separately, have an interest in any business enterprises regulated by a State Agency? Yes No

I hereby affirm that I have no interests to disclose on this schedule: _____ (initial).

Type of business entity:

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> Corporation | <input type="checkbox"/> Limited Liability Partnership (LLP) |
| <input type="checkbox"/> Partnership | <input type="checkbox"/> Limited Liability Company (LLC) |

Name of business entity: _____

Who holds the interest?

- | | | |
|---------------------------------|---|--|
| <input type="checkbox"/> Self | <input type="checkbox"/> Dependent Children | <input type="checkbox"/> Self and dependent children |
| <input type="checkbox"/> Spouse | <input type="checkbox"/> Self and spouse | |

This business entity is subject to regulation by:

###

Complete another Schedule K for each business.

*See Q & A for additional information and guidance.

