

CITY ETHICS COMMISSION

City of Hagerstown
1 East Franklin Street
Hagerstown, Maryland 21740
301.739.8577, Ext. 113 or 301.766.4183

CITY OF HAGERSTOWN CANDIDATES

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 correctly identify the reporting period.
2. Upon completion of your financial disclosure statement, sign and date the lower portion of the page beneath the required oath or affirmation and return all pages.

Reporting Period: January 1 through December 31, 2023

PLEASE PRINT OR TYPE

FIRST NAME	INITIAL	LAST NAME
CURRENT ADDRESS (WHERE YOU CAN BE SENT CORRESPONDENCE; PLEASE INDICATE IF THIS IS YOUR HOME ADDRESS. YOUR HOME ADDRESS SHALL BE REDACTED FROM PUBLIC DISCLOSURE)		
E-MAIL ADDRESS		
POSITION HELD	<input type="checkbox"/> Mayor	<input type="checkbox"/> Councilmember

This financial disclosure statement describes all interests and related transactions and matters required to be disclosed by the Code of the City of Hagerstown, Chapter 33, Section 33-3.1 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 J.

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 questions, 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 reporting period in real property located in or outside Maryland. (If "Yes," complete Schedule A.)
- B. I held interests during reporting period in corporations, partnerships and similar entities. (If "Yes," complete Schedule B.)
- C. I held interests in a non-corporate business entity which did business with the City, other than a partnership. (If "Yes," complete Schedule C.)
- D. I received gifts during reporting period from persons doing business with the City, regulated by the City, 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 City. (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 City. (If "Yes," complete Schedule F.)
- G. A member of my immediate family was employed by the City of Hagerstown 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 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.		

FORM 1 – CITY OF HAGERSTOWN CANDIDATES

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 real property in Maryland or in any other state or country? YES _____ NO _____ (If 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? _____ If improved, is it residential or commercial property? _____
Unimproved (vacant lot): _____
3. Are you the owner or tenant? Owner _____ Tenant _____
4. 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):

5. 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?

6. What date was the property acquired? _____
7. How was the property acquired? (*Example: purchase, gift, inheritance, etc.*) _____
8. 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.*) _____
9. 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*) _____
10. Have you transferred any interest in this property during the reporting period? YES _____ NO _____
If YES, please indicate the following:
 - (a) What percentage of interest did you transfer: _____%
 - (b) What consideration did you receive for the interest: _____
 - (c) To whom did you transfer the interest: _____

If you have any additional interests in real property in Washington County, Maryland, 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), limited liability companies (LLC) or other entities during the reporting period whether or not the entity did business with the City which were authorized to do business in the State of Maryland and has a place of business in Washington County, Maryland? YES _____ NO _____ If NO, please 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 is _____
3. Do you hold the interest in your name alone or is it held jointly?
In your name alone _____ Jointly _____ If held jointly, what is the percentage of your interest? _____%
4. 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: _____%
5. Are there any legal conditions or encumbrances that apply to your interest in the entity? (*Example: mortgages, liens, contracts, options, etc.*) YES _____ NO _____
If YES, the name of the entity holding the encumbrance _____
6. Did you acquire an interest in the entity during the reporting period? YES _____ NO _____
If YES, please answer the following:
 - ▶ In what month was the interest acquired? _____
 - ▶ How was the interest in the entity acquired? (*Example: purchase, gift, will, etc.*): _____
 - ▶ From whom did you acquire the interest in the entity? (*If you purchased it from a brokerage, the name of the brokerage*): _____
 - ▶ 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*): _____
7. Have you transferred any interest in this entity during the reporting period? YES _____ NO _____
If YES, please answer the following:
 - ▶ What portion of the interest was transferred? _____
 - ▶ 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*): _____
 - ▶ To whom did you transfer your interest in the entity? _____

If you have additional interests in corporations or partnerships, etc., which are authorized to do business in the State of Maryland and has a place of business in Washington County, Maryland please use additional sheet(s) if necessary, and answer each of the above questions for each additional entry.

SCHEDULE C – INTEREST IN NON-CORPORATE ENTITY DOING BUSINESS WITH THE CITY

Do you have an interest in any non-corporate business entity (a sole proprietorship) that did business with the City during the reporting period? YES _____ NO _____ If NO, go to Schedule D

If YES, please 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 definition of "Attributable".) Direct: _____ Attributable: _____

3. Do you hold the interest solely or is it jointly held with another? SOLELY _____ JOINTLY _____
 - ▶ If jointly, the percentage of your joint interest: _____%
 - ▶ Dollar value of your interest in the entity: \$ _____ or the 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 _____ NO _____

If YES, please list name of creditor: _____

5. Was any interest acquired during the reporting year? YES _____ NO _____

If YES, please answer the following:

 - ▶ What month was the interest acquired? _____
 - ▶ How was the interest in the entity acquired? (Example: purchase, gift, will, etc.) _____
 - ▶ From whom did you acquire the interest? _____
 - ▶ 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, please answer the following:

 - ▶ What percentage of interest, if less than all, was transferred? _____%
 - ▶ 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): _____
 - ▶ To whom did you transfer your interest in the entity? _____

If you have additional interests in non-corporate entities that did business with the City during the reporting year, 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 City; 2) engaged in an activity that was regulated or controlled by the City; or 3) was a regulated lobbyist?

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 _____ If NO, go to Schedule E

If YES, please answer each question below. A separate Schedule G 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, list the identity of the recipient of the gift.

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

SCHEDULE E – OFFICES, 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 City?
YES _____ NO _____ If NO, go to Schedule F

If YES, please 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 _____
 - ▶ 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 City division(s) did the business entity do business? _____

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

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

SCHEDULE F – DEBTS YOU OWE

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

YES_____ NO_____ If NO, go to Schedule G

If YES, please 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?
Increase_____ Decrease_____ 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 CITY

During the reporting period, were any members of your immediate family (spouse or dependent children) employed by the City in any capacity? YES _____ NO _____ If NO, go to Schedule H

If YES, please answer each question below. A separate Schedule G will be required for each member of the immediate family who is employed by the City.

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

2. Which department employed the member of your immediate family?

3. What was the title of your immediate family member's position with the City during the reporting period?

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

SCHEDULE H – SOURCES OF INCOME (Employment/Business Ownership)

During the reporting period, did you or any member of your immediate family (spouse or dependent child), receive any earned income from an entity other than the City of Hagerstown? 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 City or has contracts in excess of \$ 10,000 with the City. YES _____ NO _____ If NO, go to Schedule H

If YES, please 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. What is the name and address of the employer or business entity?

- ▶ 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 – REGULATED LOBBYIST SPOUSE

If, during the reporting period, your spouse is a regulated lobbyist, please list the name and address of any entity(ies) which has engaged your spouse for lobbying purposes.

- ▶ Name of spouse: _____
- ▶ Name of Entity: _____
- ▶ Address: _____
- ▶ City/State/Zip: _____

- ▶ Name of Entity: _____
- ▶ Address: _____
- ▶ City/State/Zip: _____

- ▶ Name of Entity: _____
- ▶ Address: _____
- ▶ City/State/Zip: _____

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

SCHEDULE J -- OTHER

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