

BOARD OF EDUCATION OF BALTIMORE COUNTY ETHICS REVIEW PANEL 6901 CHARLES STREET, TOWSON, MD 21204 FINANCIAL DISCLOSURE STATEMENT (CANDIDATES)

GENERAL INFORMATION:

- ❖ Pursuant to State law and regulation, if you are a candidate for election to the Board of Education of Baltimore County, you are required to file a financial disclosure statement. *See*, Md. Gen. Prov. Code Ann., §5-817; COMAR 19A.05.02.05.
- ❖ Where to File
 - Candidates are required to file a financial disclosure statement with the Board of Education's Ethics Review Panel. COMAR 19A.05.02.05(B)(2)
 - After you file your Financial Disclosure Statement with the Ethics Review Panel and it has been deemed complete, you will receive a receipt verifying that you have filed a completed Statement.
 - **RETAIN THIS RECEIPT.** It must be filed with the Board of Supervisors of Elections.
- Signature Required
 - 4 All Statements filed must be signed and dated under the Oath provided on the Statement.
- ❖ Public Record
 - A financial disclosure statement is a public record. The Ethics Review Panel will make financial disclosure statements available for examination and copying by the public.
- Schedules

You are required to complete all schedules that are applicable to your personal financial status. If additional copies of a schedule are needed, candidates may print extra schedule pages from the *Financial Disclosure Statement (Candidates)* document, which is available on the Ethics Review Panel's Web site at: https://www.bcps.org/leadership/board of education/ethics review panel/candidates. Simply click on the Financial Disclosure Statement and print the requisite schedules.

- Ethics Code
 - The Board of Education of Baltimore County's Ethics Code policies can be accessed on the Board's Web site at: https://www.bcps.org/leadership/board of education/ethics review panel/ethics code.
- ❖ Please read the FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS (CANDIDATES) and the FREQUENTLY ASKED QUESTIONS carefully prior to submitting your Financial Disclosure Statement.
- ❖ For additional information, please call our office at 443-809-4138 or contact us by e-mail at ethics@bcps.org.

Revised: 1/24/2022

- ❖ Acceptable methods for filing a financial disclosure statement:
 - **Mail or Hand Delivery:**

BOARD OF EDUCATION OF BALTIMORE COUNTY ETHICS REVIEW PANEL 6901 CHARLES STREET, BUILDING C TOWSON, MD 21204

Financial Disclosure Statement Candidates for Election to the Board of Education of Baltimore County Reporting Period: January 1 through December 31, 2021

	First statement required with Year of election. Date of			
Are	Yes No Complete the "Candidate I You are required to complete additional copies of a schemanial Disclosure State Public Schools' Web site ethics review panel/candidate print the requisite schedule page and make the required	Profile Information" lete all Schedules the dedule are needed, of ment (Candidates) of at: https://www.bdates . Simply clic les. Complete your doath and affirmation your Financial Discontinuous deted Statement for your financial detects the statement for your Financial financial detects the statement for your Financial financial detects the statement for your Financial fi	at are applicable to your person candidates may print extra schocument, which is available or cps.org/leadership/board of eak on the Financial Disclosure Financial Disclosure Statement (ALL PAGES) your records.	nal financial status. If nedule pages from the a the Baltimore County ducation/ Statement link and not, sign, and date this
Cor	ndidate's First Name:	Candidate Pro Middle Name:	file Information Last Name:	Suffix:
Cai	ididate s first Name.	Wilddie Name.	Last Name.	Sullix.
Home Address:			City/State:	Zip Code:
Home Phone Number:			Office Phone Number:	
Cell Number:			E-mail Address:	
Naı	me of Employer:			
Job	Title:			
This financial disclosure statement describes all interests and related transactions and matters required to be disclosed by General Provisions Article, Title 5, Subtitle 8 of the Maryland Public Ethics Law, COMAR 19A.05 and Board of Education Policy 8364, with respect to the period indicated and pertaining to the person filing the statement. 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 Candidate: Date:				

RETURN COMPLETED/SIGNED STATEMENT (ALL PAGES) TO:

Ethics Review Panel Board of Education of Baltimore County 6901 Charles Street, Building C Towson, MD 21204

(Check Appropriate Box):

SCHEDULE A

REAL PROPERTY INTERESTS

Ma rec	aryland or ar	nother state or country	ou have an interest (as an owner ry? (Note: In addition to your put hold in a vacation property, co	place of residence, you are also
			perty identified as your "home address" red to complete Schedule A.)	on the candidate profile information
If	I hereby aff reporting p	firm that I did not he period. I further affi	nired to sign the following AFF old an interest in real property of the state of the sign of the sign of the second of the secon	as an owner or a tenant for the tin real property located in or
	Signature:			
	<note is="" th="" th<="" what=""><th>ne address or legal your primary resider</th><th>description of the property? (Ince, you may enter the lot and bloom City</th><th>Provide street address. If the</th></note>	ne address or legal your primary resider	description of the property? (Ince, you may enter the lot and bloom City	Provide street address. If the
	Or Leg Section:	gal Description:	Block:	Lot:
2.	Are you the Owner Tenant			
	a. If □ □	Yes	le at this address during the repo	rting period?
	b. If	owner, complete Qu	estions 3 through 12.	

SCHEDULE A

REAL PROPERTY INTERESTS

3.	What kind of property is it? ☐ Improved. ☐ Indicate whether the property is residential or commercial: ☐ Residential ☐ Commercial ☐ Unimproved (vacant lot)
4.	Do you hold the interest solely or is it jointly held with another? ☐ Solely ☐ Jointly (tenants by entirety; e.g. owned with spouse)
5.	If held jointly, or as tenants by the entirety, provide the name(s) of the other joint owner(s): Name(s) of joint owner(s):
6.	Is the interest held directly by you or is it attributable to you? ☐ Directly ☐ Attributable
7.	Are there any legal conditions or encumbrances on the property (e.g., mortgage, lien, contract, options, etc.)? ☐ Yes ☐ No
	If yes, what is/are the name(s) of the lender(s), creditor(s), lien holder(s), etc.? Name(s):
	Questions 8-11, information on Maryland properties is available on the Maryland Real Property Search Website e State Department of Assessment and Taxation. https://sdat.dat.maryland.gov/RealProperty/Pages/default.aspx
8.	What date was the property acquired:/(month/date/year)
9.	How was the property acquired? □ Purchase □ Gift □ Inheritance □ Other. Explain:
10.	From whom was the property acquired? (Name of the individual or entity from whom you purchased or inherited the property or who gifted the property to you.) Name:
11.	What consideration was given/price paid 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.) \$

P a g e | **4** Revised: 1/24/2022

REAL PROPERTY INTERESTS 12. Have you transferred any interest in this property during the reporting period? Yes No

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?

Name:

If Yes, complete the following:

NOTE: If you have any additional interests in real property in Maryland or in any other state or country, you are

required to complete a Schedule A for each property and respond to each question for each property interest.

*** END OF SCHEDULE A – GO TO SCHEDULE B***

P a g e | **5** Revised: 1/24/2022

SCHEDULE B

INTERESTS IN CORPORATIONS AND PARTNERSHIPS

	aring the reporting period, did you have an interest in a corporation, partnership, limited liability reporation (LLC), or limited liability partnership (LLP)?
_	Yes No (If no, go to Schedule C)
If	you marked "yes," answer each question below. <note: a="" b="" corporation="" each="" for="" interest.="" is="" partnership="" required="" schedule="" separate=""></note:>
1.	What is the name of the entity? (Include the complete name of the entity; do not identify solely by trading symbol) Name of entity:
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:
	Street Address/Suite No.:
	City: State: Zip Code:
3.	Is the interest held directly by you or is it attributable? □ Directly □ Attributable
4.	Do you hold the interest solely or jointly? ☐ Solely ☐ Jointly (tenants by entirety; e.g. owned with spouse) If Jointly, the percentage of your interest:%
5.	What is the nature of your interest (e.g., stocks, notes, bonds, puts, calls, straddles, purchase options, etc.) and the dollar value or the number of shares? If in a non-publicly traded entity or LLP or LLC, report the percentage of ownership. a. Type of interest: □ stocks; □ notes; □ bonds; □ puts; □ calls; □ straddles; □ purchase options; □ other: □ Dollar Value: \$
	c. Percentage of Ownership:%

Page | **6** Revised: 1/24/2022

Schedule B

Interests in Corporations and Partnerships

6.	Are there any legal conditions or encumbrances that apply to your interest in the entity? (Examples: mortgage, lien, contract, option, etc.) ☐ Yes ☐ No
	If yes, what is the name of the entity holding the encumbrance? Name:
7.	Did you acquire an interest in the entity during the reporting period? ☐ Yes ☐ No
	If Yes, complete the following: a. In what month was the interest acquired:
	b. How was the interest in the entity acquired? Purchase Gift Inheritance Other. Explain:
	c. From whom did you acquire the interest in the entity? (If you purchased the entity from a brokerage, the name of the brokerage.) Name:
	d. 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, complete 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? Name:

NOTE: If you have any additional interests in corporations or partnerships, you are required to complete a Schedule B for each entity and respond to each question for each such interest.

*** END OF SCHEDULE B-GO TO SCHEDULE C^{***}

SCHEDULE C INTERESTS IN NON-CORPORATE BUSINESS ENTITIES DOING BUSINESS WITH THE BOARD OF EDUCATION

pro	uring the reporting period, did you have an interest in a non-corporate business entity (sole oprietorship) which did business with the Board of Education of Baltimore County or the ltimore County Public Schools?
_	Yes No (If no, go to Schedule D)
If	you marked "yes," answer each question below. <note: a="" c="" each="" for="" interest.="" is="" non-corporate="" required="" schedule="" separate=""></note:>
1.	Name and address of the principal office of the business entity:
	Name:
	Street Address/Suite No.:
	City: State: Zip Code:
2.	Is the interest held directly by you or is it attributable to you? □ Directly □ Attributable
3.	Do you hold the interest solely or jointly? Solely Jointly (tenants by entirety; e.g. owned with spouse) If jointly, a. Percentage of your interest:% b. Dollar value of your interest: \$
4.	Are there any legal conditions or encumbrances that apply to your interest in the entity? ☐ Yes ☐ No
	If Yes, what is/are the name of the creditor(s)? Name(s):
5.	Did you acquire an interest in the entity during the reporting period? ☐ Yes ☐ No
	If Yes, complete the following: a. In what month was the interest acquired:

Page | **8** Revised: 1/24/2022

	b. How was the interest in the entity acquired? ☐ Purchase ☐ Gift ☐ Inheritance
	☐ Other. Explain:
	c. From whom did you acquire the interest in the entity?
	(If you purchased the entity from a brokerage, the name of the brokerage.) Name:
	d. 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.) \$
5.	Have you transferred any interest in this entity during the reporting period? ☐ Yes ☐ No
	If Yes, complete the following:
	a. What percentage of interest did you transfer?%
	b. What consideration did you receive for the interest? \$
	b. What consideration did you receive for the interest? \$ c. To whom did you transfer the interest? Name:

NOTE: If you have any additional interests in sole proprietorships that did business with the Board of Education or school system during the reporting period, you are required to complete a Schedule C for each entity and respond to each question for each interest.

*** END OF SCHEDULE C – GO TO SCHEDULE D***

P a g e | **9** Revised: 1/24/2022

SCHEDULE D GIFTS

per Sch the	\$20, or a series of gifts from the same donor with a cumulative value of \$100 or more, from a son or entity who: (1) did business with the Board of Education or the Baltimore County Public hools; (2) engaged in an activity that was regulated or controlled by the Board of Education or Baltimore County Public Schools; or (3) was a regulated lobbyist? (Note: Gifts received m a member of the candidate's immediate family do not need to be disclosed.)
_	Yes No (If no, go to Schedule E)
If y	vou marked "yes," answer each question below. <note: a="" e="" each="" for="" gift="" is="" received.="" required="" schedule="" separate=""></note:>
1.	Who gave you the gift?
	Name:
2.	What was the nature of the gift? Gift card Restaurant meal Theater/Sporting event ticket Book Other – please provide an explanation of the gift:
3.	What was the value of the gift? \$
4.	Was the gift given to someone else at your direction? ☐ Yes ☐ No
	If Yes, the name of the person or entity who was the recipient of the gift: Name:

During the reporting period, did you receive any gift(s), directly or indirectly, in excess of a value

NOTE: If you have additional gifts to disclose, you are required to complete a Schedule D for each gift and respond to each question for each such interest.

*** End of Schedule D-Go to Schedule E^{***}

P a g e | **10** Revised: 1/24/2022

SCHEDULE E OFFICES, DIRECTORSHIPS, SALARIED EMPLOYMENT WITH AN ENTITY DOING BUSINESS WITH THE BOARD OF EDUCATION

During the reporting period, did you or a member of your immediate family hold an office, directorship, or salaried employment in or with a business entity doing business with the Board of Education of Baltimore County or the Baltimore County Public Schools? (Note: "Immediate family" is defined by Policy 8360 as an individual's spouse and dependent children.)

is c	lefined by Policy 8360 as an individual's spouse and dependent children.)
_	Yes No (If no, go to Schedule F)
If	you marked "yes," answer each question below. <note: a="" disclosure.="" e="" each="" for="" is="" required="" schedule="" separate=""></note:>
1.	What is the name and address of the business entity?
	Name:
	Street Address/Suite No.:
	City: State: Zip Code:
2.	Who was the individual who held the position or interest listed above? ☐ Self ☐ Spouse ☐ Dependent child
	Name of spouse or dependent child:
3.	What is the title of the office held? (Example: job title, limited partner, director, treasurer, chair of the board of trustees, etc.)
	Title of office held:
4.	What year did the position begin? Year:
5.	What was the nature of the business? ☐ Regulated by the Board of Education/School System ☐ Lobbyist with the Board of Education/School System ☐ Contract/Agreement/Lease with the Board of Education/School System ☐ Other – Explain:

NOTE: If you have additional offices, directorships, salaried employment with an entity doing business with the board of education, you are required to complete a Schedule E for each and respond to each question for each such office.

*** End of Schedule E-Go to Schedule F^{***}

P a g e | 11 Revised: 1/24/2022

SCHEDULE F

DEBTS YOU OWE TO AN ENTITY DOING BUSINESS WITH THE BOARD OF EDUCATION

During the reporting period, did you or a member of your immediate family owe a debt (excluding retail credit accounts) to an entity that does business with the Board of Education of Baltimore

	ounty or the school system? (Note: "Immediate Family" is defined by Policy 8360 as an dividual's spouse and dependent children.)
	Yes No (go to Schedule G)
If	you marked "yes," answer each question below. <note: a="" disclosure.="" each="" f="" for="" is="" required="" schedule="" separate=""></note:>
1.	To whom did you owe the debt? (Do not include consumer credit debts)
	Name:
2.	When was the debt incurred:/ (month/date/year)
3.	What is the interest rate on the debt:%
4.	What are the terms of payment on the debt? Monthly Bi-monthly Annually Other:
5.	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.) \$
6.	Did the principal of the debt increase or decrease during the reporting period? (If no change, select either one and enter 0) Increase Decrease
7.	How much was the change? \$
8.	Was any security given for the debt? Yes No a. If Yes, provide the type of security given (home, car, boat, etc.): Home Car Boat Other - Explain:

P a g e | **12** Revised: 1/24/2022

9.	Is this a transaction in which you were involved, but which resulted in a debt being owed by
	your spouse or dependent child?
	□ Yes
	□ No
	If Yes,
	a. Identify your spouse or child.
	Name:
	b. Describe the transaction:

NOTE: If you have additional debts to disclose, you are required to complete a Schedule F for each and respond to each question for such debt.

*** End of Schedule F – G0 to Schedule G***

Revised: 1/24/2022

SCHEDULE G

FAMILY MEMBERS EMPLOYED BY THE BOARD OF EDUCATION

of E	ring the reporting period, were any members of your immediate family employed by the Board Education of Baltimore County or the Baltimore County Public Schools in any capacity? (Note: mediate Family" is defined by Policy 8360 as an individual's spouse and dependent children.)
	Yes No (go to Schedule H)
If y	vou marked "yes," answer each question below. <note: a="" each="" family.="" for="" g="" immediate="" is="" member="" of="" required="" schedule="" separate="" your=""></note:>
1.	What is the name of the immediate family member employed by the Board of Education?
	Name:
2.	What is the relation of the immediate family member employed by the Board of Education? □ Spouse □ Dependent Child
3.	What was the job title of your immediate family member's position at the Board of Education during the reporting period?
	Title:
4.	Are you in a position that directly supervises, evaluates, or disciplines the immediate family member? Yes No
NO'	TE: If you have immediate family members employed by the Board of Education, you are required to complete

NOTE: If you have immediate family members employed by the Board of Education, you are required to complete a Schedule G for each and respond to each question for such family member.

*** End of Schedule G – Go to Schedule H^{***}

P a g e | **14** Revised: 1/24/2022

SCHEDULE H SOURCES OF EARNED INCOME

You are required to provide the name and address of each place of employment and of each business entity of which you or a member of your immediate family was a sole or partial owner and from which earned income was received at any time during the reporting period. (Note: a minor child's employment or business ownership does not need to be disclosed if the Board of Education does not regulate, exercise authority over, or contract with the minor child's place of employment or business.)

CIII	employment of business.)				
	d you and/or a member of your immediate fa sole or partial owner of a business entity of		- ·		
_	Yes No (go to Schedule I)				
If y	you marked "yes," answer each question < <i>Note</i> : A separate Schedule H is rec		arned income.>		
1.	Source of earned income related to:				
	□ Self□ Immediate Family MemberName:				
2.	The person indicated above earned income from employment with an entity meeting to criteria above. Yes No				
	If Yes – Please complete: Name of Employer:				
	Job Title:				
	Address:	City/State:	Zip Code:		
		l			

SCHEDULE H SOURCES OF EARNED INCOME

3.	The person indicated above earn entity meeting the criteria above		partial ownership of a business		
	□ Yes				
	□ No				
	If Yes – Please complete:				
	Business Entity:				
	Owned by:				
	Address:	City/State:	Zip Code:		

NOTE: If you or a member of your immediate family has other sources of earned income, you are required to complete a Schedule H for each and respond to each question.

*** END OF SCHEDULE H – GO TO SCHEDULE I***

OTHER
Is there any additional information or interest you would like to disclose?
□ Yes □ No
If you marked "yes," provide additional information below.