

**Financial Disclosure Statement  
for Board Members**

**BOARD OF EDUCATION OF PRINCE GEORGE'S COUNTY**

**14201 School Lane  
Upper Marlboro, Maryland 20772**

March 2023

This form is to be completed by members of the Board of Education of Prince George's County (PGCBOE), as well as candidates to be members of the PGCBOE.

1. Fill in the preliminary information requested in the box below. The reporting period is stated below.
2. Deadlines:
  - a. An incumbent Board member shall file this statement no later than April 30<sup>th</sup> for the preceding calendar year.
  - b. A Board member who is appointed to fill a vacancy shall file a statement for the preceding calendar year within 30 days after appointment.
  - c. A Board member who, other than by reasons of death, leaves office shall file a statement within 60 days after leaving the Board. The statement (Termination Report) shall cover:
    - (1) the calendar year immediately preceding the year in which the Board member left office, unless a statement covering that year has already been filed by the Board member; and
    - (2) the portion of the current calendar year during which the Board member held office.
  - d. Candidates to be members of the Board should refer to Board Policy 0107 for specific instructions.
3. Upon completion of your financial disclosure statement, sign and date the lower portion of the page and make the required oath or affirmation before a notary public or other officer authorized to take oaths.

Regular Reporting Period: January 1 through December 31, \_\_\_\_\_  
or  
*Termination Report: January 1 through \_\_\_\_\_, 2022*

**PLEASE PRINT OR TYPE**

FIRST NAME	INITIAL	LAST NAME
E-MAIL ADDRESS		

This financial disclosure statement describes all interests and related transactions and matters required to be disclosed by PGCBOE Policy 0107 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.

(SEAL) Signature of Person Filing: \_\_\_\_\_  
Date: \_\_\_\_\_  
Sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_  
Signature of Notary Public: \_\_\_\_\_  
Printed/Typed Name of Notary Public: \_\_\_\_\_  
My Commission Expires: \_\_\_\_\_

**Instructions:**

1. Check the proper block to Questions A through J. Do not leave any questions unanswered. If you check "Yes" to any question, be sure to complete the corresponding Schedule. There are additional instructions within the Schedules.
2. Interests attributable. For Schedules A, B and C, the following are deemed to be interests of the individual:
  - a) An interest held by a member of the individual's immediate family, if the interest was, at any time during the reporting period, directly or indirectly controlled by the individual.
  - b) An interest held, at any time during the applicable period, by a:
    - (i) business entity in which the individual held a 10% or greater interest;
    - (ii) business entity described in item (i) of this subsection in which the business entity held a 25% or greater interest;
    - (iii) business entity described in item (ii) of this subsection in which the business entity held a 50% or greater interest; and
    - (iv) 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.
  - c) An interest held by a trust or an estate in which, at any time during the reporting period:
    - (i) The individual held a reversionary interest or was a beneficiary; or
    - (ii) If a revocable trust, the individual was a settlor.
3. This statement is a public record and shall be made available during normal business hours for examination and copying by the public, subject to reasonable fees and standard procedures. Any persons examining or copying such statements shall be required to record their name, home address, and the name of the person(s) for whose statement was examined or copied.

Do you wish to be notified if someone looks at your statement?

Yes \_\_\_\_\_

No \_\_\_\_\_

4. The Ethics Panel will review this financial disclosure statement for completeness of form and for determination of any existing or potential conflict of interest. This statement will be retained for a period of four (4) years and then destroyed.
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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 in a business entity during the reporting period. (If "Yes," complete Schedule B.)

	YES	NO
A.		
B.		

- C. I held interests during the reporting period in a business entity which did business with the PGCBOE and/or Prince George's County Public Schools (PGCPS). (If "Yes," complete Schedule C.)
  
- D. I received gifts during the reporting period in excess of \$20 in value or a series of gifts totaling \$100 or more from or on behalf of, directly or indirectly, any one person doing business with the PGCBOE and/or PGCPS, or from an association or entity acting on behalf of an association that is engaged only in representing counties or municipal corporations. (If "Yes," complete Schedule D.)
  
- E. I or a member of my immediate family held an office or directorship (with or without salary), or salaried employment during the reporting period in or with a business entity doing business with the PGCBOE and/or PGCPS. (If "Yes," complete Schedule E.)
  
- F. I or a member of my immediate family owed debts (excluding retail credit accounts) during the reporting period to persons doing business with the PGCBOE and/or PGCPS. (If "Yes," complete Schedule F.)
  
- G. A member of my immediate family was employed by PGCBOE and/or PGCPS during the reporting period. (If "Yes," complete Schedule G.)
  
- H. I or a member of my immediate family was employed or was a sole or partial owner of a business entity from which earned income was received, during the reporting period. (If "Yes," complete Schedule H.)
  
- I. I had a financial or contractual relationship with (1) the University of Maryland Medical System; (2) a governmental entity of the State or a local government in the State; or (3) a quasi-governmental entity of the State or local government in the State. (If "Yes," complete Schedule I.)
  
- J. I have additional information and/or interests I wish to disclose. (If "Yes," complete Schedule J.)

<b>C.</b>		
<b>D.</b>		
<b>E.</b>		
<b>F.</b>		
<b>G.</b>		
<b>H.</b>		
<b>I.</b>		
<b>J.</b>		

## 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 the street address, if you know it, or the legal description (lot and block.)

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

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

Legal Description \_\_\_\_\_

2. What is the nature of the property?

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

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

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

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

4. Are you the owner or tenant?

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

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

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

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

\_\_\_\_\_

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

Yes

No

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

\_\_\_\_\_

7. On what date was the property acquired? \_\_\_\_\_

8. How was the property acquired? (Examples: 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.) \_\_\_\_\_

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

None

Below \$25,000

\$25,000 - \$99,999

\$100,000 - \$299,999

\$300,000 - \$499,999

\$500,000 + above

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

Yes

No

**If Yes:**

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

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

None

Below \$25,000

\$25,000 - \$99,999

\$100,000 - \$299,999

\$300,000 - \$499,999

\$500,000 + above

11.C. To whom did you transfer the interest? \_\_\_\_\_

11.D. Is the individual or entity identified in 11.C. doing business with the PGCBOE and/or PGCPS?

Yes  No

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

## 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 PGCBQE and/or PGCPs?

- Yes  
 No (Go to Schedule C)

**If YES, Answer each question below. A separate Schedule B will be required for each interest you need to disclose.**

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

Name: \_\_\_\_\_ (Include the complete name of the entity, do not identify solely by trading symbol)

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

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

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

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

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

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

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

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 the entity is a non-publicly traded entity or LLP or LLC, report the number of shares owned. If the entity is a partnership or a publicly traded entity, report the percentage of ownership.

Type: \_\_\_\_\_

Dollar value: \$\_\_\_\_\_ 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; **If yes**, name of entity holding the encumbrance: \_\_\_\_\_

No

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

- Yes  
 No

**If Yes:**

6A. What is the date when the interest was acquired?

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6B. How was the interest in the entity acquired? (Example: purchase, gift, inheritance, etc.):

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6C. From whom did you acquire the interest in the entity? (If you purchased it from a brokerage, the name of the brokerage): \_\_\_\_\_

6D. What consideration was given in exchange for the interest that was acquired? (Dollar amount paid, or if you acquired the interest other than by purchase, the fair market value of the interest at the time acquired.) Select one:

\_\_\_\_ None

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

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

\_\_\_\_ \$100,000 - \$299,999

\_\_\_\_ \$300,000 - \$499,999

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

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

\_\_\_\_ Yes

\_\_\_\_ No

**If Yes:**

7A. What portion of the interest was transferred? \_\_\_\_\_

7B. What was the nature of the interest transferred? \_\_\_\_\_

7C. What consideration did you receive in exchange for the interest that was transferred? (Dollar amount you received, or description of other consideration received.) Select one:

\_\_\_\_ None

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

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

\_\_\_\_ \$100,000 - \$299,999

\_\_\_\_ \$300,000 - \$499,999

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

Description of other considerations received: \_\_\_\_\_

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7D. Did you transfer the interest to any individual or entity doing business with the PGCBCE and/or PGCP? \_\_\_\_ Yes \_\_\_\_ No

7E. If known, what is the name of the person to whom the interest was transferred?

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



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

Do you have an interest in any business entity that did business with the PGCBOE and/or PGCPs during the reporting period? (Do not repeat any disclosures already made on Schedule B.)

- 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. What is the name and address of the principal office of the business entity?

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

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

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

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

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

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

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

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

3B. If solely, the percentage of your interest in the entity: \_\_\_\_\_%;  
or

The dollar value of your interest in the entity: \$ \_\_\_\_\_

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

Yes, If yes give the name of the creditor: \_\_\_\_\_

No

5. Was any interest acquired during the reporting period?

Yes

No

**If Yes:**

5A. In what month was the interest acquired? \_\_\_\_\_

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

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

5D. What consideration was given in exchange for the interest that was acquired?  
(Dollar amount paid or if you acquired the interest other than by purchase, the fair market value of the interest at the time acquired.) Select one:

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

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

- Yes
- No

**If yes:**

6A. What percentage of interest was transferred? \_\_\_\_\_ %

6B. What consideration did you receive in exchange for the interest that was transferred? (Dollar amount you received or description of other consideration received.): Select one:

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

Description of other consideration received: \_\_\_\_\_  
\_\_\_\_\_

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

6D. Is the individual or entity identified in 6.C. doing business with the PGCBOE and/or PGCPs?

- Yes     No

**A separate Schedule C will be required for each business entity. Please use additional sheets if necessary for any additional entries.**

## Schedule D – Gifts

During the reporting period, did you receive any gift(s), directly or indirectly, as defined in Board Policy 0107 section III.H. (the transfer of anything of economic value, regardless of the form, without adequate and lawful consideration) in excess of \$20 in value or a series of gifts totaling \$100 or more from or on behalf of any one person who does business with PGCBOE or PGCPs or from an association or any entity acting on behalf of an association that is engaged only in representing counties or municipal corporation? (Note: As defined in Board Policy 0107 section III. H., gift does not include political campaign contributions regulated under the Elections Article, Annotated Code of Maryland, or any other provision of State or local law regulating the conduct of elections or the receipt of political campaign contributions.

Yes

No (Go to Schedule E)

**If Yes, answer each question below. A separate Schedule D will be required for each gift.**

1. What is the name of the person or on behalf of the person, who directly or indirectly, gave you the gift?

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

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3. What was the value of the gift?

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

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

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

During the reporting period, did you or any member of your immediate family (spouse or dependent child) hold any office or directorship (with or without salary) or have any salaried employment with an entity that did business with the PGCBOE and/or PGCPS?

- Yes
- No (Go to Schedule F)

**If Yes, answer each question below. A separate Schedule E will be required for each disclosure.**

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

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

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

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

2. Who was the individual who held the position with the entity 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? (Examples: limited partner, director, treasurer, chair of the board of trustees, etc. If a traditional employee, the title of the position held.)

\_\_\_\_\_

4. In what year did the position begin? \_\_\_\_\_

5. With what PGCBOE or PGCPS office(s)/department(s) did the business entity do business? \_\_\_\_\_

\_\_\_\_\_

6. What was the nature of the business? (Examples: contract with PGCPS and/or PGCBOE, being regulated by the PGCBOE or subject to the authority of PGCPS, registered under the lobbying law, or involved with other business with PGCPS and/or PGCBOE)

\_\_\_\_\_

\_\_\_\_\_

**If necessary, please use additional sheets for any additional entries.**

## Schedule F – Debts You Owe

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

Yes

No (Go to Schedule G)

**If YES, answer each question below. A separate Schedule F will be required for each debt to be disclosed.**

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

\_\_\_\_\_

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

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

Interest Rate \_\_\_\_\_ %      Terms (monthly, bimonthly, annually, etc.): \_\_\_\_\_

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

Select one:

\$0

Below \$25,000

\$25,000 - \$99,999

\$100,000 - \$299,999

\$300,000 - \$499,999

\$500,000 + above

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

6. Was any security given for the debt?

Yes

No

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

\_\_\_\_\_

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

\_\_\_\_\_

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

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

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

Yes

No (Go to Schedule H)

**If YES, answer each question below. A separate Schedule G will be required for each member of the immediate family who is employed by the PGCBOE and/or PGCPS.**

1. What is the relation and name of the immediate family member employed by the PGCBOE and/or PGCPS? \_\_\_\_\_
2. What was the title of your immediate family member's position in the PGCBOE and/or PGCPS during the reporting period? \_\_\_\_\_
3. In what office/department/unit did the immediate family member work during the reporting period? \_\_\_\_\_

**If necessary, please use additional sheets 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 PGCBOE or PGCPS? Please note that your dependent child's employment or business ownership does not need to be disclosed unless the place of employment or the business entity is subject to regulation or the authority of the PGCBOE and/or PGCPS or has contracts with the PGCBOE and/or PGCPS.

Yes

No (Go to Schedule I)

**If YES, answer each question below. A separate Schedule H will be required for each member of the immediate family who had employment or ownership of a business entity.**

1. If, during the reporting period, you or a member of your immediate family had employment from which you or they earned income, 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: \_\_\_\_\_

3. If, during the reporting period, your spouse was a lobbyist regulated by the PGCBOE, list the name and address of the lobbyist entity that engaged your spouse for lobbying purposes.

Name of Spouse: \_\_\_\_\_

Name of Lobbyist Entity: \_\_\_\_\_

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

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

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

**Schedule I – Relationship with the University of Maryland Medical System, State or Local Government, or Quasi-Governmental Entity**

During the reporting period, did you have a financial or contractual relationship with the (1) University of Maryland Medical System; (2) a governmental entity of the State or a local government in the State; or (3) a quasi-governmental entity of the State or local government in the State?

\_\_\_\_\_ Yes

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

**If YES,** answer each question below. A separate Schedule I will be required for each different relationship.

1. Provide a description of the relationship. \_\_\_\_\_

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2. What is the subject matter of the relationship? \_\_\_\_\_

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3. What, if any, consideration was provided in the relationship? \_\_\_\_\_

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**If necessary, please use an additional sheet for any additional entries.**



**Schedule J- Additional Information**

During the reporting period, were there additional interests or information that you wish to disclose?

- Yes
- No

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