

**FINANCIAL DISCLOSURE STATEMENT
FOR ELECTED OFFICIALS PURSUANT TO CHAPTER 2.04 OF THE SALISBURY MUNICIPAL
CODE REFERRED TO AS THE "CITY'S ETHICS ORDINANCE"**

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 and make the required oath or affirmation before a notary public or other officer authorized to take oaths.

I wish to be notified of the names and addresses of any persons who have examined or copied my statement. Please check: Yes ☐ No ☐

Regular Reporting Period: January 1 through December 31, **2026**

or

Termination Report: January 1 through _____, 2026

PLEASE PRINT OR TYPE

FIRST NAME	INITIAL	LAST NAME
AGENCY AFFILIATION <i>(INCLUDE DEPARTMENT AND UNIT WHERE APPLICABLE)</i>		
CURRENT AGENCY ADDRESS <i>(WHERE YOU CAN BE SENT CORRESPONDENCE)</i>		
CURRENT POSITION OR OFFICE HELD WITH STATE, IF ANY <i>(OR OFFICE FOR CANDIDACY)</i>		
E-MAIL ADDRESS	Please list your email address on the last page of this packet (Page 18, Number 1) under Personal Information.	

This financial disclosure statement describes all interests and related transactions and matters required to be disclosed by State Government Article, Title 15, Subtitle 8 of the Maryland Public Ethics Law and Chapter 2.04 of the Salisbury City Code with respect to the period indicated and pertaining to the person filing the statement. The statement consists of this cover sheet, the checklist, and Schedules A through I.

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

Signature of Person Filing: _____

(SEAL)

Date: _____

Sworn to before me this _____ day of _____

Signature of Notary Public: _____

Printed/Typed Name of Notary Public: _____

My Commission Expires: _____

Instructions:

Check the proper block to Questions A through I. Do not leave any questions unanswered. If you check "Yes" to any question, be sure to complete the corresponding Schedule. For the purposes of this financial disclosure, the following interests are considered to be interests attributable to the individual making the statement:

- (1) 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.
- (2) An interest held, at any time during the applicable period, by:
 - (i) A business entity in which the individual held a (10) % or greater interest;
 - (ii) A business entity described in section (i) of this subsection in which the business entity held a 25% or greater interest;
 - (iii) A business entity described in section (ii) of this subsection in which the business entity held a 50% or greater interest; and
 - (iv) A business entity in which the individual directly or indirectly, through an interest in one or a combination of other business entities, holds a 10% or greater interest.
- (3) 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.

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 business entity which did business with the City. (If "Yes", complete Schedule C.)
- D. I received gifts during reporting period from or on behalf of, directly or indirectly, any one person or legal entity who does business with or is regulated by the City. (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 entities doing business with or regulated by the specific governmental unit of the City with which I work. (If "Yes," complete Schedule F.)
- G. A member of my immediate family was employed by the City of Salisbury 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.)

A.

B.

C.

D.

E.

F.

G.

H.

I.

YES	NO

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? **Please list the street address on the last page of this packet (Page 18, Number 2) under Personal Information.** If the property is your primary residence, you may enter the lot and block legal description instead, if you wish.

2. What kind of property is it?

Improved (indicate whether property is residential or commercial property): _____

Unimproved (vacant lot): _____

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

Direct _____ 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. What date was the property acquired? _____

8. How was the property acquired? (Example: purchase, gift, inheritance, etc.)

9. From whom was the property acquired? (Name of individual or entity from whom you purchased or inherited the property or who gifted the property to you.)

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

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

____ Yes

____ No

If Yes;

11.A. What percentage of interest did you transfer: _____%

11.B. What consideration did you receive for the interest: _____

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

If you have any additional interests in real property in Maryland, any other state or any other country, please use additional sheet(s), if necessary, and respond to each above question for each such entry.

Schedule B – Interests in Corporations and Partnerships

Did or do you have any interest in any corporations, partnerships, limited liability partnerships (LLP), limited liability companies (LLC) during the reporting period whether or not the entity did business with the City?

☐ Yes

☐ No (Go to Schedule C)

If Yes; (Answer each question below. A separate Schedule B will be required for each interest you need to disclose.)

1. What is the name of the entity? Include the complete name of the entity, do not identify solely by trading symbol: _____

2. Does the stock of the corporation trade on a stock exchange?

☐ Yes

☐ No

If "no," the legal address of the entity's principal office.

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

Directly: _____ Attributable: _____

4. 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: _____%

5. What is the nature of your interest and its dollar value or the number of shares? (Example: stock, notes, bonds, puts, calls, straddles, purchase options, etc.) If in a non-publicly traded entity or LLP or LLC, report the percentage of ownership.

Type: _____

Dollar Value of Shares: _____ or Number of Shares: _____

percentage of ownership: _____%

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

☐ No

☐ Yes; **If Yes**, name of entity holding the encumbrance: _____

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

☐ Yes

☐ No

If Yes:

7A. In what month was the interest acquired? _____

7B. How was the interest in the entity acquired? (Example: purchase, gift, will, etc.): _____

7C. From whom did you acquire the interest in the entity? (If you purchased it from a brokerage, the name of the brokerage): _____

7D. What consideration was given when the interest was acquired? (Dollar amount paid, or if you received the property as a gift or inherited it, the fair market value at the time you acquired your interest in the property): _____

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

____ Yes

____ No

If Yes:

8A. What portion of the interest was transferred? _____

8B. What consideration did you receive for the interest in the entity? (Dollar amount paid, or if you received the property as a gift or inherited it, the fair market value and terms at the time you transferred your interest in the property): _____

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

9. Does the entity trade as or do business under any other name(s)?

____ No

____ Yes; **If Yes**, what are the other name(s)? _____,

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 City

Do you have an interest in any business entity that did business with the City during the reporting period?

☐ Yes

☐ No (Go to Schedule D)

If Yes: (Answer each question below. A separate Schedule C will be required for each business entity to be disclosed.)

1. Name and Address of the Principal office of the business entity?

Name: _____

Address: _____

City/State/Zip: _____

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

Direct: _____ Attributable: _____

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

Solely: _____ Jointly: _____

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

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

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

☐ Yes, If yes give name of creditor: _____

☐ No

5. Was any interest acquired during the reporting year?

☐ Yes

☐ No

If Yes:

5A. What month was the interest acquired? _____

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

5C. From whom did you acquire the interest? _____

5D. What consideration was given when the interest was acquired? (Dollar amount paid or if you received the property as a gift or inherited it, the fair market value at the time you acquired your interest in the property) _____

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

☐ Yes

☐ No

If Yes;

6A. What percentage of interest, if less than all, was transferred? _____%

6B. What consideration did you receive for the interest in the entity? (Dollar amount paid or if you received the property as a gift or inherited it, the fair market value and terms at the time you transferred your interest in the property): _____

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

If you have additional interests in business 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 or does business with the City; 2) engaged in an activity that was regulated or controlled by the City; or 3) from an association, or an entity acting on behalf of an association that is engaged only in representing counties or municipal corporations (including the Maryland Association of Counties and the Maryland Municipal League). 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 (Go to Schedule E)

If Yes; (Answer each question below. A separate Schedule D will be required for each gift.)

1. Who gave you the gift?

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

3. What was the value of the gift?

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

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

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

During the reporting period, did you or any member of your immediate family (spouse or dependent child) have any salaried employment or hold any office or directorship with an entity that did business with the City?

___ Yes

___ No (Go to Schedule F)

If Yes; (Answer each question below. A separate Schedule E will be required for each disclosure.)

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

Name: _____

Address: _____

City/State/Zip: _____

2. Who was the individual who held the position or interest listed above? (Example: yourself, spouse, dependent child)

Self: _____ Spouse: _____ Dependent child: _____

2A. Name of spouse or dependent child: _____

3. What is the title of the office you, your spouse or dependent child held? (Example: limited partner, director, treasurer, chair of the board of trustees, etc.) _____

4. What year did the position begin? _____

5. With what City Department(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 State)

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

Schedule F – Debts You Owe

During the reporting period, did you owe a debt (excluding a retail credit account) to a financial entity that did business with the City or is regulated by 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 (Go to Schedule G)

If Yes; (Answer each question below. A separate Schedule F will be required for each debt to be disclosed.)

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

2. When was the debt incurred? _____

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

Interest Rate _____

Terms (monthly, bimonthly, annually, etc): _____

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

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

6. Was any security given for the debt?

☐ Yes
☐ No

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

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

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

Schedule G – Family Members Employed by the 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 (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 City.)

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

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

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

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

Schedule H – Employment/Business Ownership

During the reporting period, did you or any member of your immediate family, receive any earned income from an entity other than the City of Salisbury? 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 your department or has contracts in excess of \$10,000 with your department.

___ 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 regulated lobbyist, list your spouse's name and the entity that engaged your spouse.

Name: _____

Name of Entity: _____

Address: _____

City/State/Zip: _____

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

Schedule I - Financial or Contractual Interests with the University of Maryland Medical System, Governmental Entity, or Quasi-governmental Entity

Did or do you have any financial or contractual relationship with the University of Maryland Medical System, Governmental Entity, or Quasi-governmental Entity? Quasi-governmental Entity is defined as an entity that is created by state statute, that performs a public function, and that is supported in whole or in part by the state but is managed privately.

___ Yes
___ No

If Yes; (Answer each question below. A separate Schedule I will be required for each disclosure.)

1. What name and address of the entity?

Name: _____

Address: _____

City/State/Zip: _____

3. What is the nature of the relationship (Example: financial or contractual):

4. When did the relationship begin? _____

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?

☐ Yes

☐ No

If Yes; (describe the information or interest. A separate Schedule I will be required for each disclosure.)

STANDARDS OF CONDUCT

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

Filers wanting more detailed information about these requirements should contact the offices of the State Ethics Commission.

PRIVACY NOTICE

The Public Ethics Law (State Government Article, Title 15), Annotated Code of Maryland) requires the collection of this information, which will be used primarily for public disclosure and to determine compliance with the Law. The information may be disclosed to any requesting person, including officials of State, local or federal government, who records their name and address, and this record will be provided to the filer upon request. The subject has the right to review, correct and amend the record as set forth in the Public Ethics Law, Md. Code Ann., State Gov't § 10-625. Failure to file or to report information required by Public Ethics Law and Chapter 2.04 of the Salisbury City Code can subject you to civil and administrative penalties including termination or other disciplinary action, suspension of pay, a late filing fee up to \$250, and a civil fine of up to \$500 per day, and a criminal penalty with a fine of up to \$500 or imprisonment of up to one year. Willful and false filing is subject to criminal penalty for perjury pursuant to Criminal Law Article § 9-101, Annotated Code of Maryland.

Personal Information

This page shall be removed should we receive a request to examine or copy your Statement.

1. Your e-mail address _____

2. What is the address or legal description of the property? (Schedule A, Number 1)

Street Address _____

City/State/Zip _____