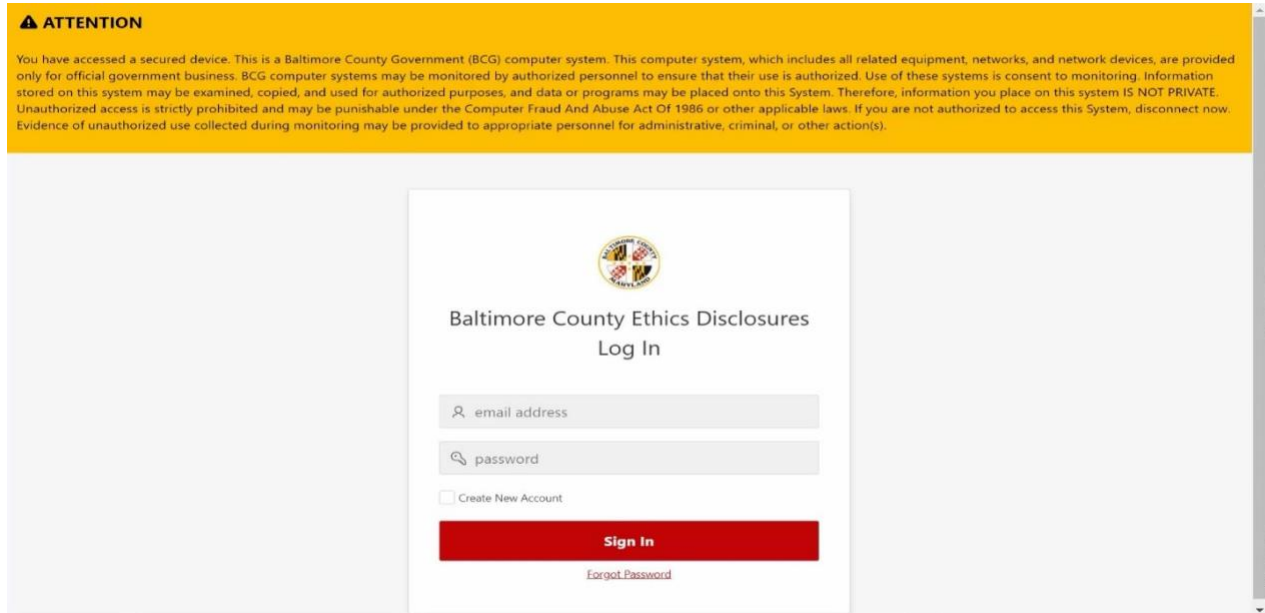
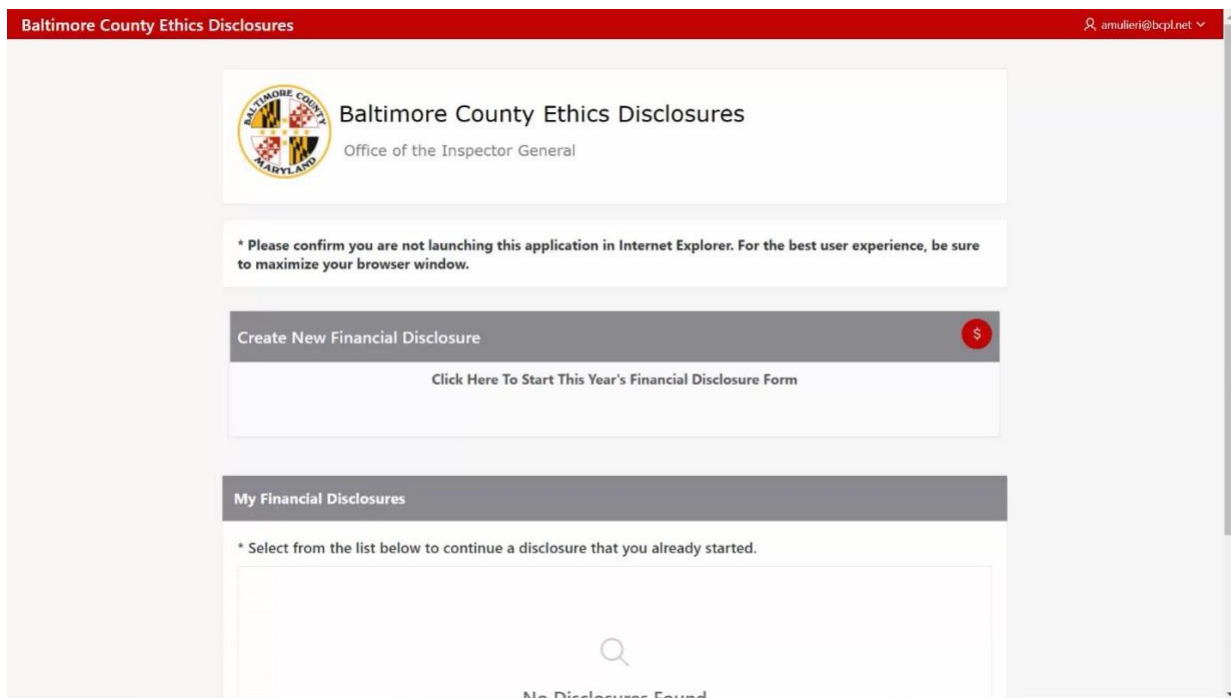


How to File a Baltimore County Financial Disclosure Statement



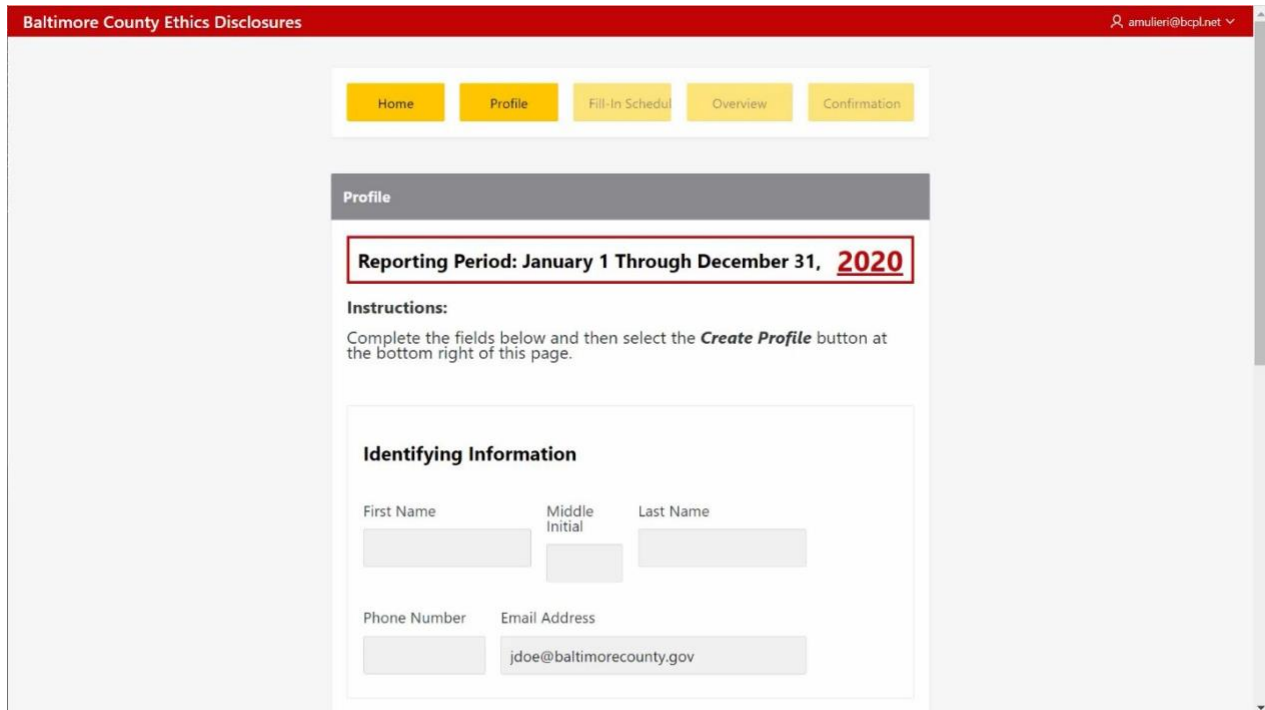
Before you begin, please confirm that you are launching the program in Google Chrome and not Internet Explorer. Please also make sure that your screen is maximized so you can see all of the relevant information.

At the login screen, the first time you log in, you will need to enter an email and a password to create a new account. You can either use your Baltimore County email or a personal email. Once you have created a new account, you will use this email and password to login to the system. Next year, you will be able to login and review your prior financial disclosure statement.



How to File a Baltimore County Financial Disclosure Statement

To create a new financial disclosure, click on the “Click Here to Start This Year’s Financial Disclosure Form.”



The screenshot shows the 'Baltimore County Ethics Disclosures' website. At the top, there is a red navigation bar with the text 'Baltimore County Ethics Disclosures' on the left and a user profile 'amulieri@bcpl.net' on the right. Below the navigation bar is a horizontal menu with five yellow buttons: 'Home', 'Profile', 'Fill-In Schedules', 'Overview', and 'Confirmation'. The 'Profile' button is currently selected. The main content area is titled 'Profile' and features a red-bordered box containing the text 'Reporting Period: January 1 Through December 31, 2020'. Below this, there are 'Instructions:' which state: 'Complete the fields below and then select the **Create Profile** button at the bottom right of this page.' The 'Identifying Information' section contains several input fields: 'First Name', 'Middle Initial', 'Last Name', 'Phone Number', and 'Email Address'. The 'Email Address' field is pre-filled with 'jdoe@baltimorecounty.gov'.

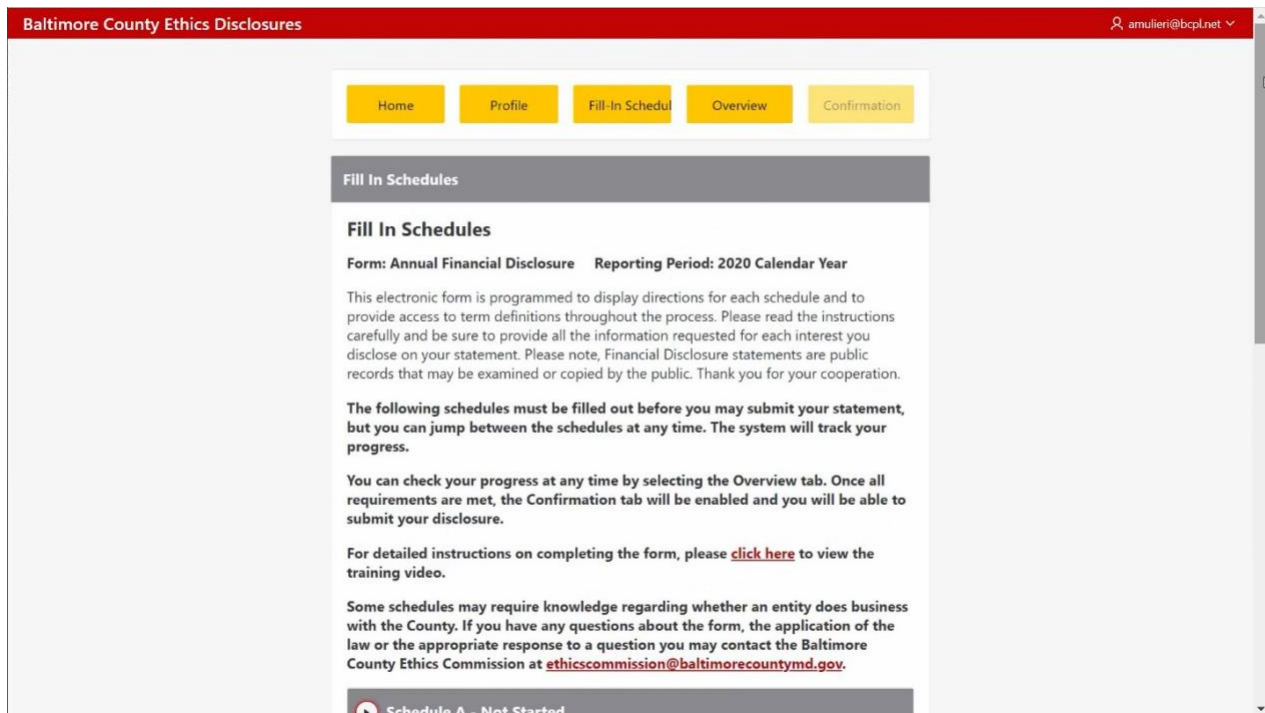
At this Home/Profile Page – simply enter your identifying information. Please make sure to use your home address and not your work address. Also please include any and all contact information. For the phone number section – simply enter the ten digits without parenthesis or dashes.

You will see that there are five (5) yellow buttons at the top but only two (2) are available to you at this time. Those schedules will become available once you have completed the prior sections.

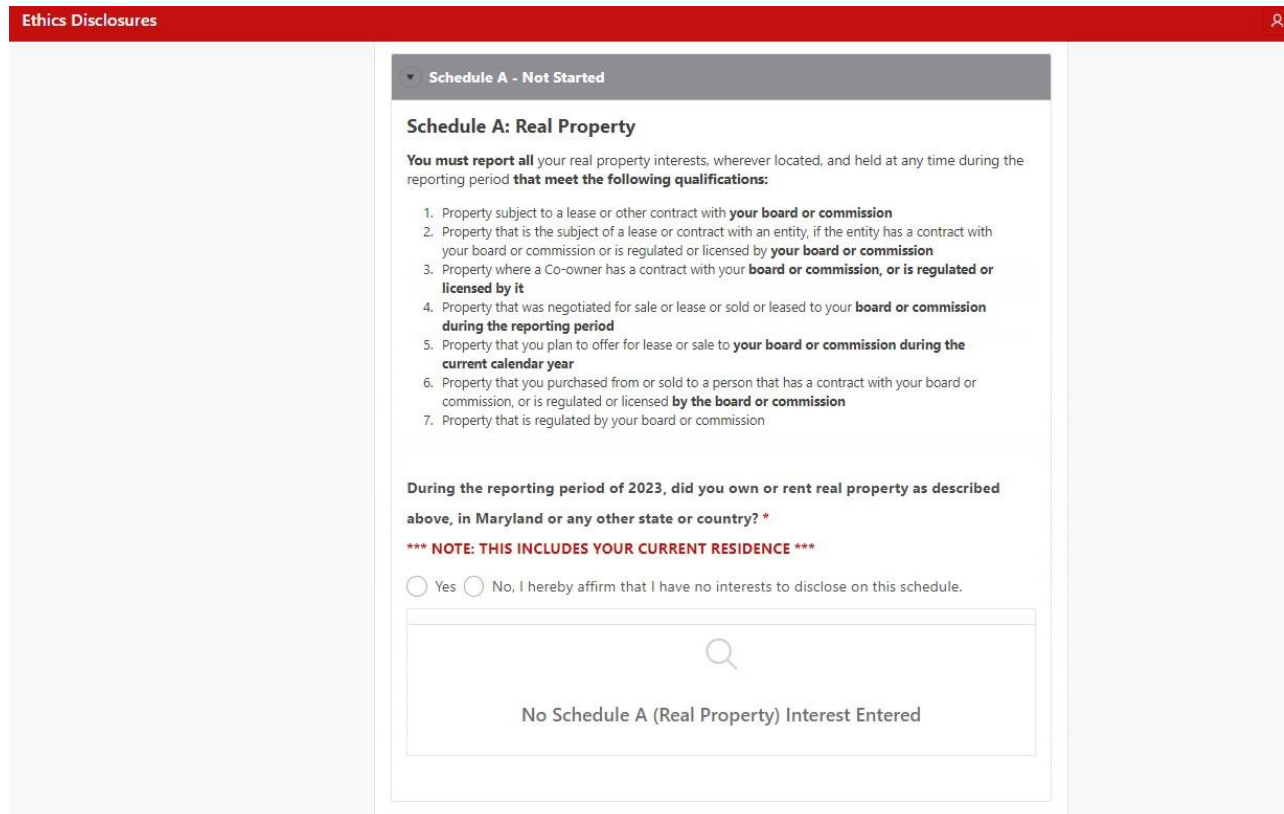
If you are running for office, you need to check the box that you are running for office.

Once you have filled out the Home/Profile page – you will be allowed to move to the next yellow button which is the Fill-In Schedules.

How to File a Baltimore County Financial Disclosure Statement



It is important to enter the information accurately. If you have any questions, please contact the ethicscommission@baltimorecountymd.gov.



How to File a Baltimore County Financial Disclosure Statement

Schedule A is where you report any and all interests in real property only if it is related to your board or commission regardless of where the property is located. This includes any and all land that you own, land that you rent, land that you live on if it is related to your board or commission.

Once you have entered any and all responses to Schedule A, you may move to the next section.

Ethics Disclosures

Schedule B - Securities

Schedule B: Securities

You must report each security or ownership interest (stocks, bonds, membership interests, partnership interests, etc.) you held in a corporation, partnership, limited liability partnership (LLP), or limited liability company (LLC) during the reporting period **that meet the following qualifications:**

1. Interests of greater than 3 percent in entities regulated or licensed by or otherwise under the **authority of your board or commission**
2. Interests of greater than 3 percent in entities negotiating a contract or having a contract with your **board or commission that involve doing business with the County in the amount of \$5,000 or more annually - [Click Here For List of Vendors](#)**
3. Interests of greater than 3 percent in entities that do business with **your board or commission**
4. Interests of 20 percent or greater in entities in which an interest is also owned by a person regulated by, contracting with (in an amount of \$5,000 or more annually), licensed by, or lobbying before **your board or commission**
5. Interests of 20 percent or greater in entities that own a direct financial interest in another entity regulated by, contracting with (in an amount of \$5,000 or more annually), licensed by, or lobbying before **your board or commission**

If you would like to send this information in a separate document – please send an email to the ethicscommission@baltimorecountymd.gov and attach the document; however you will need to add at least one interest onto the Schedule B.

Note: When answering questions, please select the option that best describes your current situation. If you feel that the selected answer needs further explanation, you can add more details in Schedule X.

What type of security is this? Stock	Name of the Security MICROSOFT
Is security held by you or attributable to you? <input type="radio"/> Directly By You <input type="radio"/> Attributable To You	Is the security publicly traded? <input checked="" type="radio"/> Yes <input type="radio"/> No

Schedule B are your interests in Stocks and/or Securities that are regulated by your board or commission or in which you own greater than three percent in entities that do business with your board or commission or are negotiating a contract with your board or commission. There are several examples of what is NOT a security. Please read the words very carefully.

How to File a Baltimore County Financial Disclosure Statement

▼ Schedule C - In Progress

Schedule C: Ownership In Business Entities

You must report any interest in any non-corporate business entities that did business with your board or commission during the reporting period that meet the following qualifications:

1. Interests of greater than 3 percent in entities regulated or licensed by or otherwise **under the authority of your board or commission**
2. Interests of greater than 3 percent in entities negotiating a contract or having a **contract with your board or commission that involve doing business with the County in the amount of \$5,000 or more annually**
3. Interests of greater than 3 percent in entities that **do business with your board or commission**
4. Interests of 20 percent or greater in entities in which an interest is also owned by a person regulated by, contracting with (in an amount of \$5,000 or more annually), licensed by, or lobbying **before your board or commission**
5. Interests of 20 percent or greater in entities that own a direct financial interest in another entity regulated by, contracting with (in an amount of \$5,000 or more annually), licensed by, or lobbying **before your board or commission**

(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 of 2023, 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.

Add New Business Entity



No Schedule C (Business Entities) Entered

Schedule C is asking for any and all interests in LLCs, LLPs, and Corporations etc that meet the qualifications listed in numbers 1-5. The key is whether they are connected in some way to your board or commission. If you have any questions, please contact ethicscommission@baltimorecountymd.gov.

How to File a Baltimore County Financial Disclosure Statement

► Schedule C - Complete

▼ Schedule D - In Progress

Schedule D: Gifts

You must report each gift you received during the reporting period, along with all gifts given to another person at your direction **that meet the qualifications listed below**. 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 upload a listing of all your gifts with their complete description.

You must disclose any gift 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, from the following:

1. A regulated lobbyist
2. An entity engaged in activity regulated or controlled by your Board or Commission
3. An entity that otherwise did business with your Board or Commission

You are not required to disclose:

1. Meals or beverages received and consumed in the presence of the donor or sponsoring entity
2. Ceremonial gifts or awards of insignificant monetary value

During the reporting period of 2023, 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.

Add New Gift



No Schedule D (Gifts) Entered

How to File a Baltimore County Financial Disclosure Statement

Schedule D is asking for you to disclose any and all gifts that you have received. A gift is defined as anything of value over \$20.00 under the Public Ethics Laws. You must disclose any and all gifts that you have received. These are gifts that are being given to you in your capacity as a member of a Board or Commission – not as a private citizen. When in doubt – you should disclose any gift. Failure to disclose a gift could be a violation of the Public Ethics Laws. If you have any questions about this, please contact the ethicscommission@baltimorecountymd.gov.

Ethics Disclosures

...the schedules of any time the system will track your progress.

You can check your progress at any time by selecting the Overview tab. Once all requirements are met, the Confirmation tab will be enabled and you will be able to sign and submit your disclosure.

For detailed instructions on completing the form, please [click here](#) to view the training video.

Some schedules may require knowledge regarding whether an entity does business with the County. If you have any questions about the form, the application of the law or the appropriate response to a question you may contact the Baltimore County Ethics Commission at ethicscommission@baltimorecountymd.gov.

- ▶ Schedule A - In Progress
- ▶ Schedule B - Complete
- ▶ Schedule C - Complete
- ▶ Schedule D - In Progress
- ▼ Schedule E - In Progress

Schedule E: Debts & Liabilities

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

During the reporting period of 2023, did you have any debts owed to entities that did business with, or were regulated by your Board or Commission? *

Yes No, I hereby affirm that I have no interests to disclose on this schedule.

[Add New Debt](#)

	Debt Type	Debtor	Year/Payment/Rate	Debt Amount	Balance Change	Collateral?
	Vehicle Loan	SECU MD	2023 / Monthly / 5% - 7.5%	\$1,000 - \$4,999	Decreased by 2	No

1 - 1 of 1

* Select the pencil to edit or delete a debt or liability.

[Done Adding Debts & Liabilities](#)

Schedule E is asking for you to disclose any and all Debts & Liabilities to any entity that did business with or was regulated by your board or commission. Credit card debits are not considered debts for Schedule E. If you have any questions about whether or not the entity that you have a debt with did business with or was regulated by your board or commission – please contact ethicscommission@baltimorecountymd.gov.

How to File a Baltimore County Financial Disclosure Statement

Ethics Disclosures b

▶ Schedule B - Complete

▶ Schedule C - Complete

▶ Schedule D - Complete

▶ Schedule E - Complete

▼ Schedule F - Complete

Schedule F: Employment & Offices Held

You must report any offices, directorships, salaried or unsalaried employment you held during the reporting period. Please answer all questions related to each position disclosed that meet the following qualifications:

You must disclose:

1. Any outside employment where you earned a salary, **REGARDLESS OF WHETHER** your employer did business with the County
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 County

During the reporting period of 2023, did you hold any offices, directorships, salaried or unsalaried employment that satisfies the disclosure requirements above? *

Yes No, I hereby affirm that I have no interests to disclose on this schedule.

🔍

No Schedule F (Employment or Office Held Positions) Entered

Schedule F is asking for other jobs and positions you hold besides your current service on the Board or Commission, regardless of whether the other place(s) you work for did business with the county.

How to File a Baltimore County Financial Disclosure Statement

Baltimore County Ethics Disclosures

amulleri@bcpl.net

Schedule G - Not Started

Schedule G: Spouse

You must report each place of salaried employment held by your spouse during the reporting period, **REGARDLESS OF WHETHER** your spouse's employer did business with the County. You must also report unsalaried offices, directorships, or similar positions for your spouse with any entity that did business with the County. You must also report any solely or partially owned business from which your spouse earned income.

You may only enter one spouse, if you need to add a new spouse, you must first delete the existing spouse record.

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 County during the reporting period, you must also identify each client that engaged your spouse for lobbying purposes.

During the reporting period of 2020, did you have a spouse who had any of the above employment or business interests? *

Yes No

Search

Schedule G is asking for information about the salaried employment for your spouse and whether or not your spouse is a registered lobbyist. Please enter any relevant employment information about your spouse's employment in Schedule G.

Ethics Disclosures

amulleri@bcpl.net

Schedule F - Complete

Schedule G - Complete

Schedule H - Not Started

Schedule H: Dependent Children

During the reporting period, was your dependent child employed by your board or commission in any capacity? You must also report any salaried or unsalaried offices, directorships or similar positions for your dependent child with any entity that did business with your board or commission. You must report any solely or partially owned business from which your dependent child earned income, if they did business with your board or commission.

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.

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

1. The County
2. An entity regulated by the County - [Click Here For List of Vendors](#)
3. An entity that has contracts in excess of \$10,000 with the County

During the reporting period of 2023, 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.

Search

No Schedule H (Dependent Children) Entered

How to File a Baltimore County Financial Disclosure Statement

Schedule H is asking for you to disclose information about salaried employment for your dependent child. A dependent child is defined as a child under the age of 18. You only need to disclose if your dependent child works or worked for the county, an entity regulated by the county, or an entity that does more than \$10,000 with the county.

The screenshot shows a web application interface for filing ethics disclosures. At the top, a red header bar contains the text "Ethics Disclosures" on the left and a magnifying glass icon on the right. Below the header, a vertical sidebar on the left contains four menu items: "Schedule F - Complete", "Schedule G - Complete", "Schedule H - Complete", and "Schedule I - Not Started". The "Schedule I - Not Started" item is expanded, revealing the following content:

Schedule I: Relationship With County Government

You must report any and all relationships that you have with a County government agency for compensation. For each interest disclosed, 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 a County government agency
2. Any contractual relationship with a County government agency
3. Any transaction with the a County government agency involving a monetary consideration

During the reporting period of 2023, did you have any relationships with the County government? *

Yes No, I hereby affirm that I have no interests to disclose on this schedule.

Below the question is a search bar with a magnifying glass icon and the text "No Schedule I (County Relationships) Entered".

Schedule I is asking you to disclose all of your relationships with County government (other than your being a member of a board or commission).

How to File a Baltimore County Financial Disclosure Statement

Ethics Disclosures

▸ Schedule D - Complete

▸ Schedule E - Complete

▸ Schedule F - Complete

▸ Schedule G - Complete

▸ Schedule H - Complete

▸ Schedule I - Complete

▼ Schedule J - In Progress

Schedule J: Businesses Regulated by your Board or Commission

During the reporting period of 2023, did you or any member of your immediate family, together or separately, have an interest in any business enterprises regulated by your Board or Commission? *

Yes No, I hereby affirm that I have no interests to disclose on this schedule.

[Add New Regulated Business](#)

1 - 1

	Business Type	Business Name	Held By
	Limited Liability Partnership	PARTNERSHIP, LLP	John Doe (Spouse)

* Select the pencil to edit or delete a regulated business.

[Done Adding Regulated Businesses](#)

Schedule J asks you to disclose any and all financial relationships with any and all businesses regulated by your board or commission. If you are unsure about what this schedule is asking about, please contact the ethicscommission@baltimorecountymd.gov.

How to File a Baltimore County Financial Disclosure Statement



▶ Schedule A - In Progress

▶ Schedule B - Complete

▶ Schedule C - Complete

▶ Schedule D - In Progress

▶ Schedule E - In Progress

▶ Schedule F - In Progress

▶ Schedule G - In Progress

▶ Schedule H - In Progress

▶ Schedule I - In Progress

▶ Schedule J - In Progress

▼ Schedule X - Not Started

Schedule X: Additional Information

Schedule X is an optional schedule if you have other interests, debts or transactions that have not been disclosed on the previous schedules and which you feel should be disclosed. This is also the chance to add more explanation or clarification to any of your responses on other schedules.

If you served as a member of a County board or commission during the reporting period, please list the name of that board or commission.

Do you have any additional information you would like to disclose for the reporting period of 2023? *

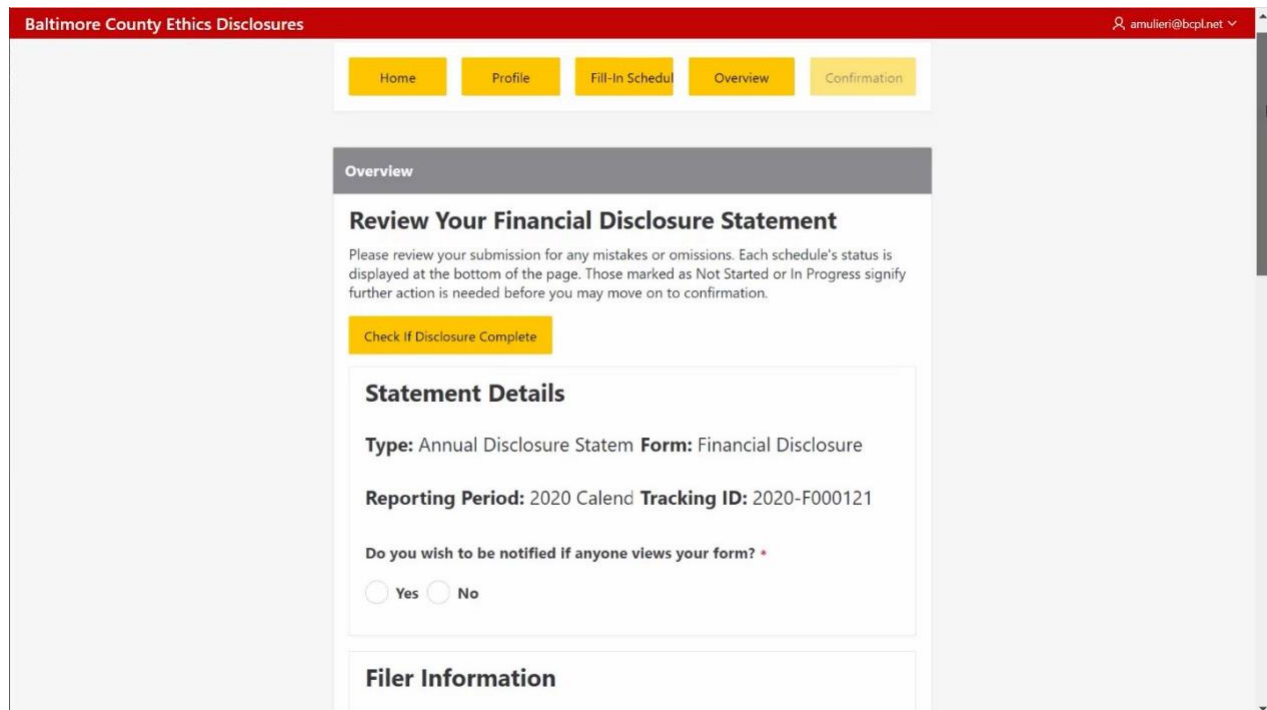
Yes No, I hereby affirm that I have no interests to disclose on this schedule.



No Schedule X (Additional Information) Entered

How to File a Baltimore County Financial Disclosure Statement

Schedule X is a broad catch all question and an opportunity for you to disclose any interests that were not specifically addressed in earlier questions but that you would like to tell the Ethics Commission about.

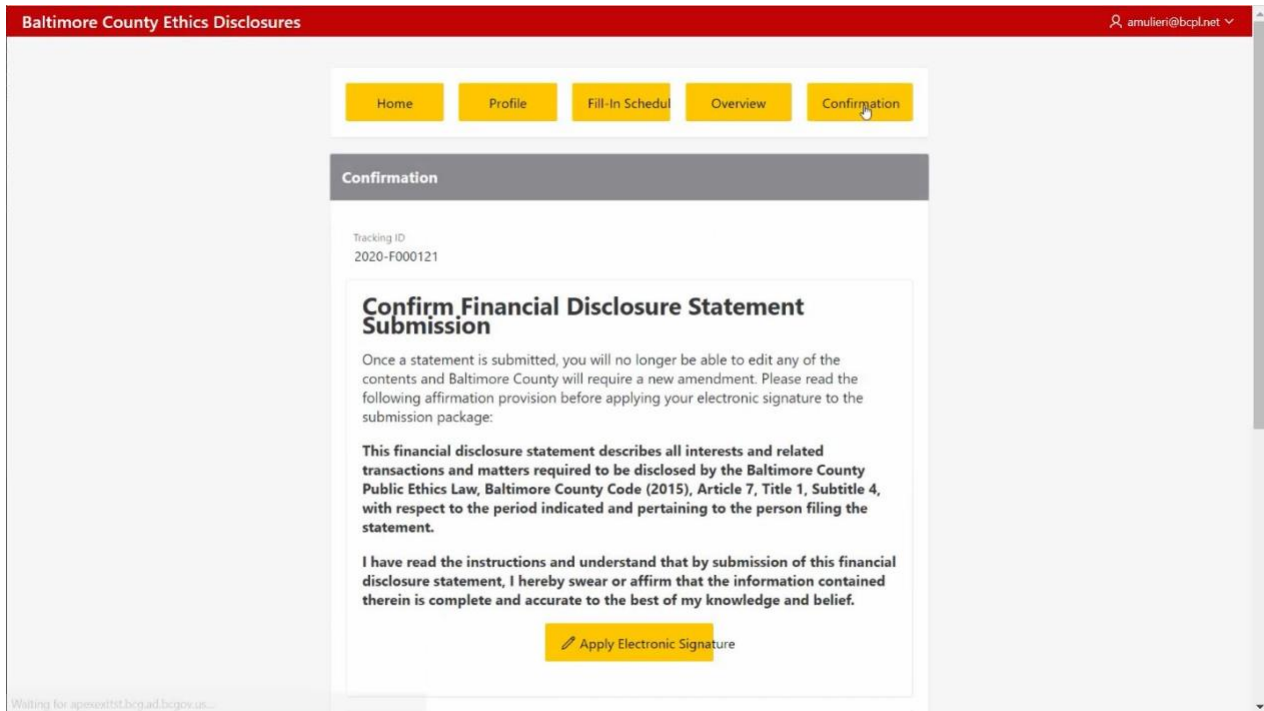


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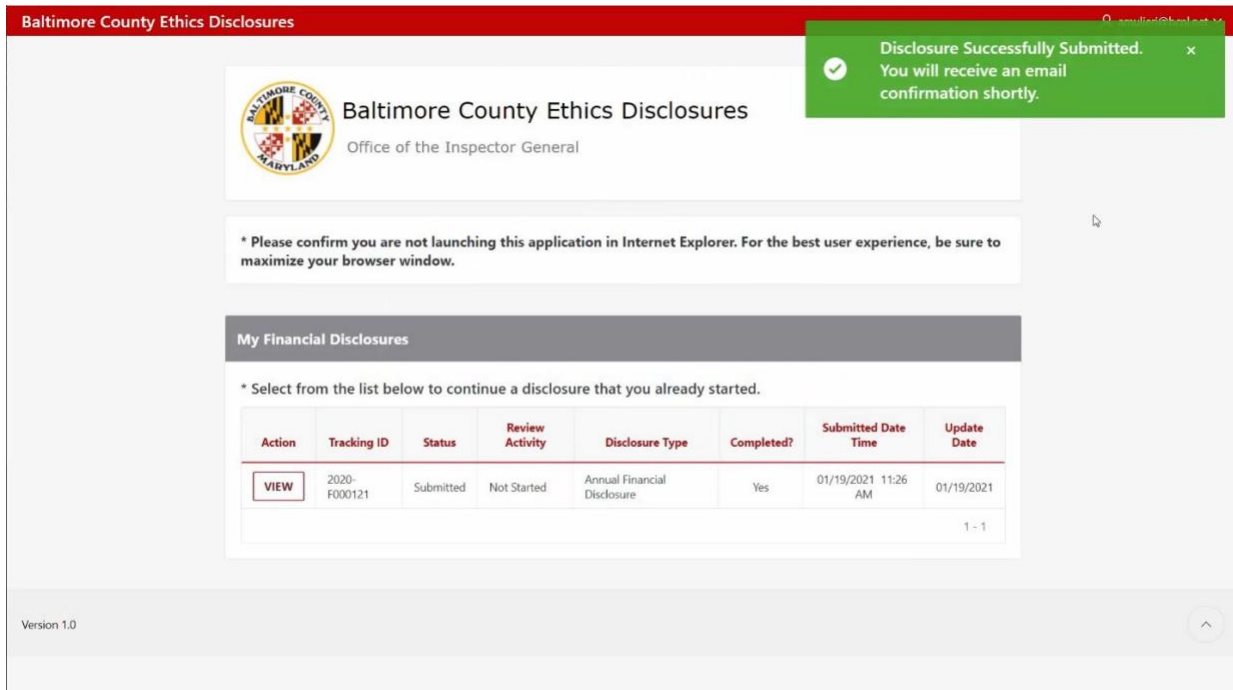
- Review Your Financial Disclosure Statement**
Please review your submission for any mistakes or omissions. Each schedule's status is displayed at the bottom of the page. Those marked as Not Started or In Progress signify further action is needed before you may move on to confirmation.
A yellow button labeled 'Check If Disclosure Complete' is located below this text.
- Statement Details**
Type: Annual Disclosure Statem **Form:** Financial Disclosure
Reporting Period: 2020 Calend **Tracking ID:** 2020-F000121
Do you wish to be notified if anyone views your form? *
 Yes No
- Filer Information**

Once you have completed all of the schedules, the fourth (4th) yellow button at the top "Overview" is now available. Once you click on this yellow "Overview" button, you will have an opportunity to review what you have submitted thus far. If you have not completed each schedule up to this point, you will not be able to click the "Overview" button. This "Overview" section also gives you an opportunity to ask to be notified if someone asks to see a copy of your financial disclosure. You will also see a summary of each and every schedule and how you have filled out the schedule. If at any point, you need to make a change or update any information, simply click on update to go back to the schedule and enter the information.

How to File a Baltimore County Financial Disclosure Statement

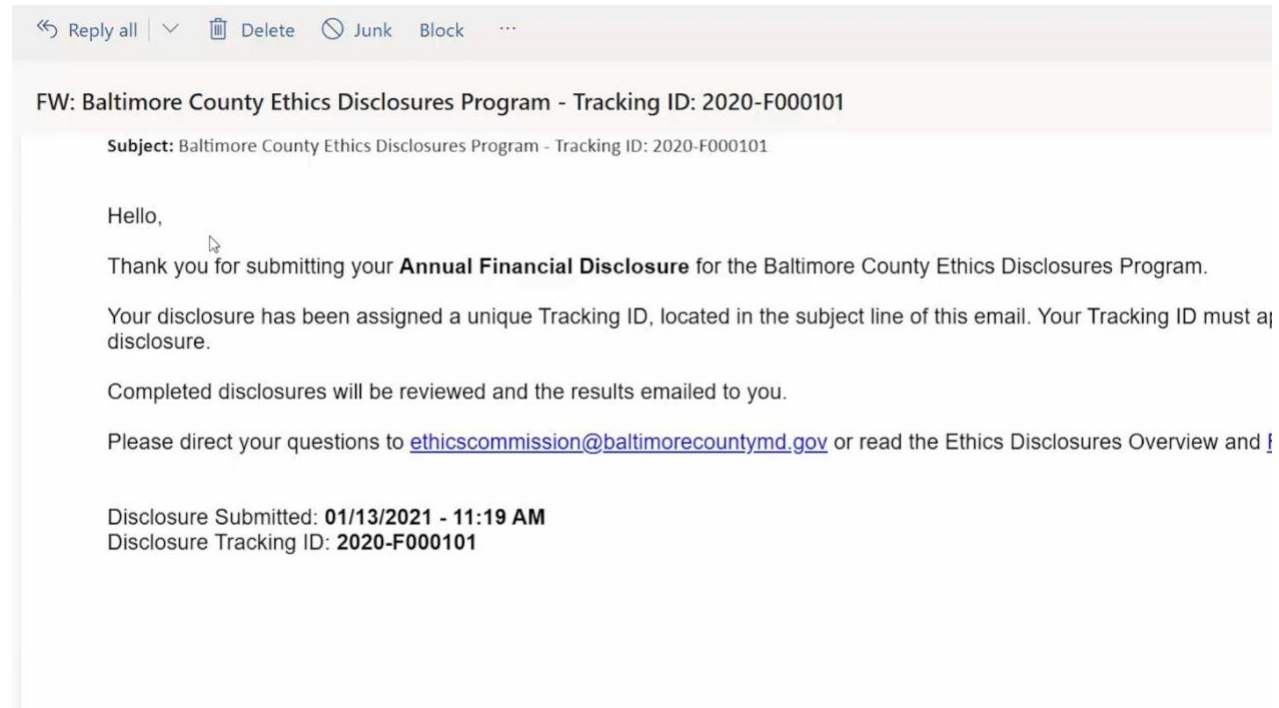


Once you have completed and confirmed that the information is correct, you will click on the fifth (5th) yellow button at the top "Confirmation." If all of the information is accurate, apply your electronic signature.



How to File a Baltimore County Financial Disclosure Statement

Once you have successfully created a financial disclosure, a green box will appear at the top right hand corner and you will see your disclosure below. You will then receive an email confirming that your financial disclosure has been received.



The above is a copy of the email that you will receive once you have successfully submitted your financial disclosure. Your disclosure will then be reviewed by a member of the Ethics Commission and their staff and you will receive another email letting you know if your submission has been accepted or rejected.

Again, if you have any questions, please contact ethicscommission@baltimorecountymd.gov.