



Administrative Office of the Courts  

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Human Resources

**Judiciary Financial Disclosure Statement  
Instructions for Online Filing**

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### 1 How to Access the Disclosure Form.

- Log into the system using the following URL:
  - <https://mdcourts-fds.aithent.com/disclosure/filing.action>
- Enter your MD Court login credentials.
- After logging in, you will be redirected to the Dashboard page.
- The Dashboard page will allow you to Initiate a New Filing as well as to access your Current and Past Filings.

#### 1.1 New Filing

- A “New Filing” queue will be displayed where the Disclosure form may be accessed by clicking the hyperlink.

| Filing Year |
|-------------|
| 2023        |

- Click on the “Click here to start a new filing.” hyperlink.

Click here to start a new filing.

- The Financial Disclosure form will appear as shown below.

**Financial Disclosure 2.0**

Filing Year: 2022

Fields marked as \* are mandatory.

**Maryland Judiciary Financial Disclosure Statement**

\*Choose the appropriate designation/title for your statement

Select \*Filing year  
2022

Separation report  
 Yes

**Filing Period**

\*From \*To  
12/31/2022  
01/01/2022

**DRAFT** - Your draft statement will be available under the current filing portlet in the dashboard. You can always edit the draft version. Clicking on DRAFT button will save the information but not submit the disclosure form for review.  
**SUBMIT** - After a statement is submitted, it will be reviewed internally prior to being forwarded to the State Ethics Commission. Once submitted, edits can be made by creating an amendment.

**Statement Detail**

- Schedule A - Real Properties
- Schedule B - Interests in Corporations (Stocks Mutual Funds etc.)
- Schedule C1 - Interests Held in Business Entities Other Than Corporations
- Schedule C2 - Obligations of Others
- Schedule D - Gifts Received
- Schedule E - Offices/ Directorships/ Salaried Employment
- Schedule F - Loans Owed
- Schedule G - Employment of



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- If you have already created a filing, then you will see a New Filing dashboard as below that allows you to create a new filing.

**Actions**

You have already initiated your filing for the year 2023. [Click here to start another filing.](#)

## 1.2 Current Filing

- The system will have a current Filing queue that lists the filing submitted.

| Statement Id | Statement Created Date | Status       | Status Changed Date | Due Date   | Title                       | Statement Type                   | Actions |
|--------------|------------------------|--------------|---------------------|------------|-----------------------------|----------------------------------|---------|
| 9132         | 12/27/2023 05:11       | Draft        | 12/27/2023 10:11    | 04/30/0024 | District Court Commissioner | Amendment of Statement Id - 9131 |         |
| 9131         | 12/27/2023 02:47       | Filed        | 12/27/2023 07:51    | 04/30/0024 | District Court Commissioner | Amendment of Statement Id - 9130 |         |
| 9130         | 12/27/2023 02:19       | Filer Review | 12/27/2023 07:44    | 04/30/0024 | District Court Commissioner | Amendment of Statement Id - 9099 |         |
| 9128         | 12/14/2023 04:49       | Under Review | 12/21/2023 12:51    | 04/30/0024 | District Court Commissioner | Amendment of Statement Id - 9099 |         |

- The following icons appear under the Actions column:
  - The **Edit** icon will be available only for filings that have been saved as a draft.
  - The **PDF** icon will let you download the PDF version of the submitted form.
  - The **Copy** icon will let you copy the statement/amendment, and it will be created as a new statement.
  - The **Amendment** icon will be enabled to amend the Disclosure form. A copy of your current Statement will open from which you can make any necessary corrections. Once your changed Statement is saved and submitted, it will appear as an Amended Statement

## 2 How to Submit the Disclosure Form

### 2.1 Forms and Instructions:






- Schedules A to I will be displayed vertically on the left-hand side of the screen. Clicking on the schedules will display the respective schedules of the disclosure form.
- Mandatory fields are marked with a red color asterisk symbol
- Each schedule has an instruction icon - that will open the instructions for each schedule.
- The schedules can be toggled by clicking on the toggle icon.



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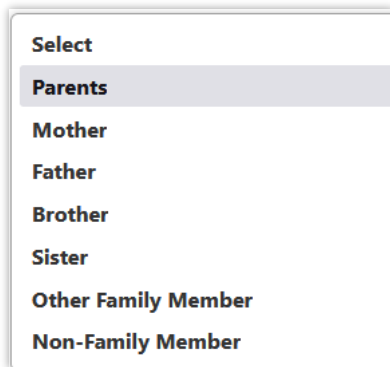
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## Human Resources

- All schedules will have a plus sign icon  on the table header to allow you to create additional entries (i.e., multiple properties on Schedule A).
- All schedules will have a Save and Close button  
- Clicking the Save button will save the information.
- Clicking the Close button will close the information.
- The schedule tables will have an edit icon  allowing you edit the information.
- The schedule tables will have a delete icon  allowing you to delete the information.

## 2.2 New Business Rule

- The schedules are designed to make sure that family members' names are not included in the disclosure form (i.e., Schedules A, B, C1, D, E, and F).
- Select their relationship to you.



Select

- Parents
- Mother
- Father
- Brother
- Sister
- Other Family Member
- Non-Family Member

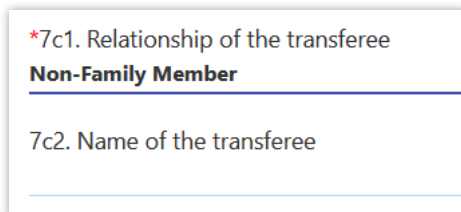
- If **Other Family Member** is selected, enter only their relationship to you.



\*7c1. Relationship of the transferee  
Other Family Member

7c2. Relationship of transferee

- If **Non-Family Member** is selected, enter their name.



\*7c1. Relationship of the transferee  
Non-Family Member

7c2. Name of the transferee

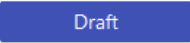
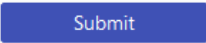




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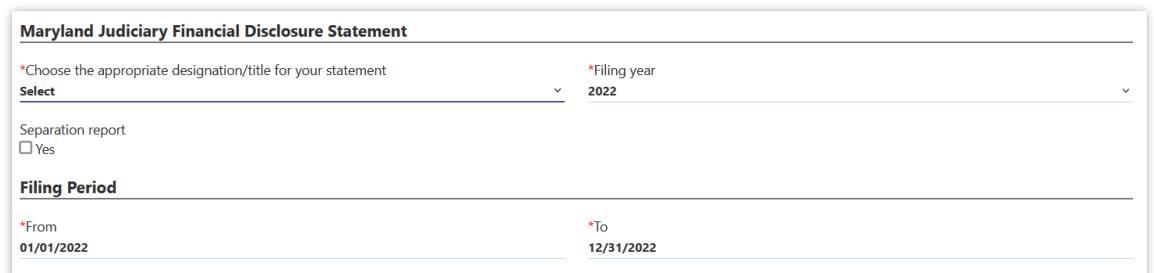
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### 2.3 Buttons

- The form has two buttons – Draft and Submit.
- Clicking on the **Draft** button -  will not validate the mandatory information required to complete the form.
- Clicking on the **Submit** button -  will validate the mandatory information required.
  - All schedules must be answered while submitting the form.
  - Once you click Submit, the form may not be edited. There is an option to create an amendment.
- Clicking the **Save** button  under each schedule will validate the mandatory information for the corresponding schedule.
- Clicking the **Close** button  under each schedule will close the information for the corresponding schedule.

### 2.4 Statement Detail

- The general Instructions section of the form prepopulates the Filing Year and Filing Period as shown below.



**Maryland Judiciary Financial Disclosure Statement**

\*Choose the appropriate designation/title for your statement  
Select  \*Filing year

Separation report  
 Yes

**Filing Period**

\*From 01/01/2022 \*To 12/31/2022

- Please select the Designation/Title of your statement.
- If the filing is a separation report, please click on the separation report and key in the **From** and **To** date.



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### 2.5 Instructions for All Schedules

- All the schedules must be answered with either a “Yes” or “No” depending on your filing period information. For example, if you have an interest in real property, then select “Yes”.

\*A. I held during the reporting period interests in real property located in or outside Maryland. (If "Yes", complete Schedule A.)

Yes No

\* 1. What type of property is it? \* County \* State or Country

- If ‘Yes’ is answered, the system will display the Schedule A information.

Yes No

\* 1. What type of property is it? \* County \* State or Country

\*1. What type of property is it?  
Select

**2. What is the location of property? (For the location of any real property, report only the county and state of the situs of each such property.)**

\*County \*State or Country  
Select

\*3a. What is the nature of interest? \*3b. What is the extent of the interest?  
Select Select

\*4a. Are there conditions affecting interest but excluding easement? (Contracts, Options, Other)  
Yes No

\*4b. Are there encumbrances affecting interest, but excluding assessments? (Mortgage, Liens, Other)  
Yes No

\*5a. Provide the date when the property was acquired

\*5b. How was the property acquired?  
Select

- Each schedule will have a Save and Close button SAVE CLOSE



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- Clicking the save button will validate the mandatory information for the respective schedule.

\*1. What type of property is it?  
 Select

1. What type of property is it?

**2. What is the location of property? (For the location of any real property, report only the county and state of the situs of each such property.)**

\*County  
 Select  
 County

\*State or Country  
 State or Country


\*3a. What is the nature of interest?  
 Select  
 3a. What is the nature of interest?

\*3b. What is the extent of the interest?  
 Select  
 3b. What is the extent of the interest?

\*4a. Are there conditions affecting interest but excluding easement? (Contracts, Options, Other)  
 Yes  No

4a. Are there conditions affecting interest but excluding easement?(Contracts, Options, Other)


- Answer the mandatory fields and other information necessary.

- Once the information is entered, click the Save button 
- The information submitted for Schedule A will be constructed as a table as shown below.

\*A. I held during the reporting period interests in real property located in or outside Maryland. (If "Yes", complete Schedule A.)  
 Yes  No

| * 1. What type of property is it? | * County | * State or Country |  |
|-----------------------------------|----------|--------------------|--|
| Residential                       | Howard   | MD                 |  |

- Click the Edit icon  information included in Schedule A has to be modified.

- Click the Plus sign button  if more than one real property has to be submitted.

| * 1. What type of property is it? | * County | * State or Country |  |
|-----------------------------------|----------|--------------------|--|
| Other                             | Allegany | MD                 |  |
| Residential                       | Howard   | MD                 |  |





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## 3 Documents for Schedules A and/or B

At the end of Disclosure form, there is a section where you can upload documents to Schedules A and/or B.

| Type       | Description | File Name |
|------------|-------------|-----------|
| Schedule A |             |           |
| Schedule B |             |           |

Please upload your supporting documents as necessary.

1. If you have supporting document(s) for Schedule A, click the upload icon to attach your file(s).
2. If you have supporting document(s) for Schedule B, click the upload icon to attach your file(s).
3. Any additional documents can be uploaded by clicking the button. This will allow you to select file(s) from your computer. Then click the upload button.

### 3.1 Schedule A – Real Properties

Do you have information to report on Schedule A? Select “Yes” or “No”.

\*A. I held during the reporting period interests in real property located in or outside Maryland. (If "Yes", complete Schedule A.)

Yes No



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Here are the guidelines:

- 1) Select the type of property.

\*1. What type of property is it?  
**Select**

|                    |
|--------------------|
| <b>Select</b>      |
| <b>Residential</b> |
| <b>Industrial</b>  |
| <b>Commercial</b>  |
| <b>Other</b>       |

- 2) If the property is "Residential", complete the fields below.

\*1. What type of property is it?  
**Residential**

2. What is the location of property? (For the location of any real property, report only the county and state of the situs of each such property.)

|                          |                   |
|--------------------------|-------------------|
| *County<br><b>Select</b> | *State or Country |
|--------------------------|-------------------|

- 3) If the property is "Industrial", "Commercial" or "Other", complete the fields below.

\*1. What type of property is it?  
**Other**

2. What is the location of property? (For the location of any real property, report only the county and state of the situs of each such property.)

|                          |                   |
|--------------------------|-------------------|
| *Address                 | *City             |
| *County<br><b>Select</b> | *State or Country |
| *Zip                     |                   |



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- Answer Question 3a.

\*3a. What is the nature of interest?

Select

Select

Direct

Attributable

\*4b. Are there encumbrances affecting interest but excluding easements? (Mortgage, Lien)

- Answer Question 3b.

\*3b. What is the extent of the interest?

Select

Select

Joint

Individual

In Common

- If the answer is "In Common", the following dropdown menu will appear.

3c. If the interest is held in common with another, what is the extent of the interest?

Select

Select

1/2

1/3

1/4

N/A

Other

- 4) Answer Question 4a.

\*4a. Are there conditions affecting interest but excluding easement? (Contracts, Options, Other)

Yes No



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- If you answer “Yes” enter a description as noted below.

4a1. If yes, please describe.

- 5) Answer Question 4b.

\*4b. Are there encumbrances affecting interest, but excluding assessments? (Mortgage, Liens, Other)

Yes No

- If you answer “Yes”, please enter responses for the questions below:

4b1. Name of the lender

4b2. Interest rate

4b3. Principal balance at the end of the reporting period

4b4. Amount by which the principal balance was reduced during the reporting period.

4b5. If other, please describe

- If “No” is your answer, the follow-up question will not appear.

- 6) Answer Questions 5a and 5b.

\*5a. Provide the date when the property was acquired

|

\*5b. How was the property acquired?

Select

- 7) Answer Question 5c1.

Please note that you should not disclose the names of any family members.

- If you select “Parents”, “Mother”, “Father”, “Brother” or “Sister”, you will not be required to submit additional information.



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\*5c1. Relationship of the person from whom property acquired?  
**Select**

|                     |
|---------------------|
| <b>Select</b>       |
| Parents             |
| Mother              |
| Father              |
| Brother             |
| Sister              |
| Other Family Member |
| Non-Family Member   |

- If you select “Other Family Member”, please answer Question 5c2 (relationship of the person).

|  |                                 |
|--|---------------------------------|
| *5c1. Relationship of the person from whom property acquired?<br>Other Family Member | 5c2. Relationship of the person |
|--|---------------------------------|

- If your answer is "Non-Family Member", please answer Question 5c2 (name of person).

\*5c1. Relationship of the person from whom property acquired?  
**Non-Family Member**

---

5c2. Name of the person from whom the property is acquired

---

- 8) Answer Question 6.

\*6. What is the value of the property?

---

- 9) Answer Question 7a.

\*7. Have you transferred any interest in this property, during the reporting period? (not previously reported in question 4)  
**Select**

|               |
|---------------|
| <b>Select</b> |
| Yes           |
| No            |



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- If your answer is “Yes”, then please answer the follow-up questions- 7a, 7b, 7c1.

|  |  |
|--|--|
| 7a. What is the nature of consideration? | 7b. What is the amount of consideration? |
| <hr/>                                    |  |
| *7c1. Relationship of the transferee     |  |
| <b>Select</b>                            |  |

- 7c1 question has follow-up questions if you answer “Other Family Member” or “Non-Family Member”.

|                            |
|----------------------------|
| <b>Select</b>              |
| <b>Parents</b>             |
| <b>Mother</b>              |
| <b>Father</b>              |
| <b>Brother</b>             |
| <b>Sister</b>              |
| <b>Other Family Member</b> |
| <b>Non-Family Member</b>   |

- If “Other Family Member” is selected, please answer the following.

|                                      |                                 |
|--------------------------------------|---------------------------------|
| *7c1. Relationship of the transferee | 7c2. Relationship of transferee |
| <b>Other Family Member</b> v         | <hr/>                           |

- If “Non-Family Member” is selected, please answer the following.

|                                      |
|--------------------------------------|
| *7c1. Relationship of the transferee |
| <b>Non-Family Member</b>             |
| <hr/>                                |
| 7c2. Name of the transferee          |
| <hr/>                                |



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## 10) Answer Question 8

8. What is the identity of other persons with interest in this property?  
**Other Family Member**

Select

- Parents
- Mother
- Father
- Brother
- Sister
- Other Family Member**
- Non-Family Member
- NA

- If “Other Family Member” is selected, please answer the following.




\*8. What is the identity of other persons with interest in this property? **Other Family Member**      \*8b. Relationship of other persons

- If “Non-Family Member” is selected, please answer the following.

\*8. What is the identity of other persons with interest in this property? **Non-Family Member**      \*8c. Name of other persons

## 11) Click the “Save” button to submit your Schedule A information.

- If you have additional real properties to report, click the plus sign (+) icon to open a blank Schedule A.

| * 1. What type of property is it? | * County       | * State or Country |    |
|-----------------------------------|----------------|--------------------|---|
| Other                             | Baltimore City | MD                 |   |

## 3.2 Schedule B – Stocks/Mutual Funds

Do you have information to report on Schedule B? Select “Yes” or “No”.

### Interests In all corporations held during reporting period

\*B. I held during the reporting period interests in corporation(s). (If “Yes”, complete Schedule B.)?

Yes No



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Answer “No” to the Schedule B question if you have no interest in the corporation.

1) Answer to the question no “1a. Is this a publicly traded corporation?”.

- If your answer is “Yes” then enter the name of the corporation and the location.

\*1a. Is this a publicly traded corporation?

Yes  No

\*Name of the corporation

---

State

---

- If your answer is “No”, enter the name of the corporation and the location.

\*1a. Is this a publicly traded corporation?

Yes  No

\*Name of the corporation

---

|         |                        |
|---------|------------------------|
| Address | Address 2 (Suite, etc) |
| <hr/>   | <hr/>                  |
| City    | State                  |
| <hr/>   | <hr/>                  |
| Zip     |                        |
| <hr/>   |                        |

2) Answer Question 2a.

\*2a. What is the nature of the interest held?

**Select**

**Select**

**Direct**

**Attributable**





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3) Answer Question 2b.

\*2b. What is the extent of the interest held?

Select

Select

Joint

Individual

In Common

- If your answer is “In Common”, then answer Question 2c.

\*2b. What is the extent of the interest held?  
In Common

2c. If the interest is held in common with another, what is the extent of the interest?  
Select

4. Answer Question 3 if the corporation is publicly traded.

3. What are the number of shares owned if a publicly traded corporation?

5. Answer Questions 4a and 4b if the corporation is non-publicly traded.

4a. What are the number of shares?

4b. What is the percentage of ownership (or dollar amount owned)?

6. Answer Question 5a.

- If “Yes” is selected, then enter a description.

\*5a. Are there conditions affecting interest (contracts, options or other)?

Yes No

If yes, please describe

- If “No” is selected there will be no additional questions.



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7. Answer Question 5b.

- If “Yes” is selected, then enter a description.

\*5b. Are there encumbrances affecting interest (liens or other)?

Yes  No

If other, please describe

---

8. If “No” is selected there will be no additional questions

9. Answer Question 6.

- If “Yes” is selected, then enter a description.

\*6. Are there any other "interests" in the corporation (notes, bonds, other)?

Yes  No

If yes, please describe

---

- If “No” is selected there will be no additional questions

10. Answer Question 7.

- If “Yes” is selected, then answer Questions 7a, 7b and 7c.

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

Yes  No

|  |                          |
|--|--------------------------|
| 7a. Nature and amount of any consideration received. | 7b. Interest transferred |
| <hr/>  | <hr/>                    |
| 7c. Relationship of transferee                       |                          |
| <b>Select</b>  |                          |
| <hr/>  |                          |

- If your answer to Question 7c is “Other-Family Member” then answer Question 7c1 (list their relationship only).

|  |                                 |
|--|---------------------------------|
| <input type="radio"/> Other Family Member            | <hr/>                           |
| <input type="radio"/> Non-Family Member              |                                 |
| <input checked="" type="radio"/> Other Family Member | 7c1. Relationship of transferee |




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- If your answer to Question 7c is “Non-Family Member” then answer Question 7c1. (enter name of the transferee).

|  |                                 |
|--|---------------------------------|
| 7c. Relationship of transferee<br><b>Non-Family Member</b> | 7c1. Identity of the transferee |
|--|---------------------------------|

11. Click the Save button  to submit your Schedule B information.

### 3.3 Schedule C1 – Business Entities (Other Than Corporations)

1. Do you have information to report on Schedule C1? Select “Yes” or “No”.

Interest held during reporting period other than business entities

\*C1. I held during the reporting period interests in a business entity(ies) (other than corporations) and/or the obligation(s) of others. (If answer to either or both is “Yes”, complete Schedule C1.)?

Yes  No

- Answering “Yes” will prompt you the more information as follows.

2. Answer Question 1.

|                                 |                        |
|---------------------------------|------------------------|
| *1. Name of the business entity |                        |
| <input type="text"/>            |                        |
| *Address                        | Address 2 (Suite, etc) |
| <input type="text"/>            | <input type="text"/>   |
| *City                           | *State                 |
| <input type="text"/>            | <input type="text"/>   |
| *Zip                            |                        |
| <input type="text"/>            |                        |

3. Answer Question 2a.

|   |
|---|
| *2a. What is the nature of the interest held?                   |
| <input type="radio"/> Direct <input type="radio"/> Attributable |

4. Answer Question 2b.

|  |
|--|
| *2b. What is the extent of the interest held?  |
| <input type="radio"/> Joint <input type="radio"/> Individual <input type="radio"/> In Common |



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- If your answer is “In Common” then, answer Questions 2b and 2c.

\*2b. What is the extent of the interest held?

Joint  Individual  In Common

2c. If the interest is held in common with another, what is the extent of the interest?

Select

|        |
|--------|
| Select |
| 1/2    |
| 1/3    |
| 1/4    |
| N/A    |
| Other  |

5. Answer Question 2d.

\*2d. What is the amount of the interest held? (percent of ownership or dollar value)

---

6. Answer Question 3a.

\*3a. Are there conditions affecting interest (pledges, contract options, other)?

Yes  No

- If “Yes”, then enter a description for Question 3a1.

\*3a. Are there conditions affecting interest (pledges, contract options, other)?

Yes  No

3a1. If yes, please describe

---

- If “No” is selected there will be no additional questions.

7. Answer Question 3b.

\*3b. Are there encumbrances affecting interest (liens, other)?

Yes  No



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- If your answer is “Yes”, then answer the follow-up question 3b1 as follows.

\*3b. Are there encumbrances affecting interest (liens, other)?

Yes  No

3b1. If yes, please describe(include name of the lender,creditor, lineor or other, affecting interest).

---

- If "No" is selected there will be no additional questions.

### 8. Answer Question 4.

\*4. Was the interest transferred during the reporting period?

Yes  No

- If your answer is “Yes”, then answer Questions 4a, 4b and 4c.

\*4. Was the interest transferred during the reporting period?

Yes  No

**If yes, please answer the following questions.**

---

4a. What percentage of interest was transferred?

---

4b. What was the nature and amount of any consideration received?

---

4c. Relationship of the person to whom you transfer the interest in the entity?

**Select**

- Select the relationship for Question 4c. If you select “Other Family Member”, answer Question 4c1 (relationship only).

4c. Relationship of the person to whom you transfer the interest in the entity?

4c1. Relationship of transferee



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- If you select “Non-Family Member” then answer Question 4c1.

|   |  |
|---|--|
| 4c. Relationship of the person to whom you transfer the interest in the entity?<br><b>Non-Family Member</b> | 4c1. To whom did you transfer your interest in the entity? |
|---|--|

9. Click the Save button **SAVE** to submit your Schedule C1 information.

### 3.4 Schedule C2 – Obligations of Others

1. Do you have information to report on Schedule C2? Select “Yes” or “No”.

**Obligations of others**

\*C2. I held during the reporting period interests in a business entity(ies) (other than corporations) and/or the obligation(s) of others. (If answer to either or both is “Yes”, complete Schedule C2.)?

Yes No

- If your answer is “Yes”, then follow-up questions for Schedule C2 will be displayed.
- If your answer is "No" then follow-up questions will not be displayed.

2. Please answer the following questions for Schedule C2. Please note that all questions are mandatory.

#### **Obligations of others, Including U.S., State, Municipal & Corporate Brands, Notes & Debentures**

\*1. What is the name of the obligor?

---

\*1a. What is the address of the obligor?

---

\*2. What is the nature of the obligation?

---

\*3a. What is the condition of the obligation?

**Secured**

---

\*3b. What is the character of security of the obligation?

---

\*4a. What is the principal amount of the obligation?

---

\*4b. What is the obligation's rate of interest?

---

\*4c. What is the obligation's date of maturity?

---

3. When finished, click the Save button **SAVE** to submit your Schedule C2 information.



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## 3.5 Schedule D – Gifts Received

1. Do you have information to report on Schedule D? Select “Yes” or “No”.

\*D. I received during the reporting period gifts as defined in the instructions pertaining to Schedule D. (If “Yes”, complete Schedule D.)

Yes No

- If your answer is “Yes”, then follow-up questions will be displayed.
- If your answer is “No”, then follow-up questions will not be displayed.

2. Answer Questions 1 and 2.

**Gifts Received During Reporting Period**

1. What is the nature and value of the gift?

\* Nature of gift: \_\_\_\_\_ \* Dollar amount: \_\_\_\_\_

**NOTE: Only a gift in excess of \$250 needs to be reported.**

\*Nature of gift: \_\_\_\_\_ \*Dollar amount: \_\_\_\_\_

If not in money, describe and state value: \_\_\_\_\_

\*2. What is the identity of the person from whom gift was received? \_\_\_\_\_

3. Answer to the question no 3

3. Was the gift given to another person at your direction?

Select

Select

Yes

No

- If your answer is “Yes”, then please answer the follow-up questions.

3. Was the gift given to another person at your direction? Yes

3a. What is the relationship? Select

- If your answer to Question 3a is “Other Family Member”, then list their relationship only.

3a. What is the relationship? Other Family Member

3a1. Relationship of the transferee \_\_\_\_\_



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- If your answer to Question 3a is “Non-Family Member”, then answer Question 3a1.

|   |  |
|---|--|
| 3a. What is the relationship?<br><b>Non-Family Member</b> | *3a1. Identity of the person to whom the gift was given at your direction? |
|---|--|

4. Click the Save button **SAVE** to submit the Schedule D information.

### 3.6 Schedule E – Salaried Employment

1. Do you have information to report on Schedule E? Select “Yes” or “No”.

Offices, Directorships and Employment held during reporting period

\*E. I held office(s), directorship(s), or salaried employment and/or received compensation earned during the reporting period. (If “Yes”, complete Schedule E.)

Yes  No

- If your answer is “Yes”, then, follow-up questions will be populated.
- If your answer is “No”, then follow-up questions will not be populated.

2. Answer the question below.

\*What is the name of the principal office of the business entity?

---

3. Answer the question below.

\*Is address your personal residence?

Yes  No

- If your answer is, “Yes”, provide the County and State only.

\*Is address your personal residence?

Yes  No

\*State \*County  
Select

---





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- If your answer is “No”, then complete all the address fields as shown below.

\*Is address your personal residence?

Yes  No

\*Address Address 2 (suite, etc.)

---

\*City \*Zip

---

\*State

---

4. Answer Questions 2, 3 and 4.

\*2. What is the title and nature of office, directorship or salaried employment held?

---

\*3. What is the total compensation received from business entity for each such office, directorship or salaried employment?

---

\*4. Other compensation required to be reported pursuant to the instructions for Schedule E.

---

5. Please click the Save button  to submit your Schedule E information.

### 3.7 Schedule F – Loans Owed

1. Do you have information to report on Schedule F? Select “Yes” or “No”.

\*F. I owed loan(s) during the reporting period (not including those listed under Schedule A). (If “Yes”, complete Schedule F.)

Yes  No

- If your answer is “Yes”, then follow-up questions will be displayed.
- If your answer is “No”, then follow-up questions will not be displayed.



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### 2. Answer Questions 1, 2, 3 and 4

| Loans Owed During the Reporting Period   |                                   |
|--|-----------------------------------|
| *1. What is the identity of the lender?  |                                   |
| <input type="text"/>   |                                   |
| *2. What is the amount of debt owed as of last day of reporting period?                                  |                                   |
| <input type="text"/>   |                                   |
| 3. What are the terms of payment of the loan?  |                                   |
| *Type of loan:   | *Terms:<br><b>Select</b>          |
| 4. To what extent did the principal amount of the loan increase or decrease during the reporting period? |                                   |
| *Loan direction:<br><b>Select</b>  | *Monetary range:<br><b>Select</b> |

### 3. Answer Question 5.

\*5. Was any security given for the debt?

- If your answer is “Yes” then describe the type of security.

\*5. Was any security given for the debt?

If yes, please describe the type of security:

- If “No” is selected there will be no additional questions.

### 4. Answer Question 6.

6. Is this a transaction involving you but resulting in a loan to spouse or child?

**Select**

|               |
|---------------|
| <b>Select</b> |
| <b>Yes</b>    |
| <b>No</b>     |



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- If your answer is “Yes”, then please answer Questions 6a and 6c.

6. Is this a transaction involving you but resulting in a loan to spouse or child?  
**Yes**

**If this is a transaction involving you but resulting in a loan to spouse or child, identify spouse or child and describe transaction.**

\*6a. Type of relationship  
**Select**

\*6c. Describe the transaction

5. Answer Question 6a.

\*6a. Type of relationship  
**Select**

**Select**

**Spouse**

**Son**

**Daughter**

**Child**

**Other**

- If you select "Other", please answer Question 6b (relationship only).

\*6a. Type of relationship  
**Other**

6b. List the relationship

- Click the Save button **SAVE** to submit your Schedule F information.

### 3.8 Schedule G – Family Members Employed

1. Do you have information to report on Schedule G? Select “Yes” or “No”.

\*G. A member of my immediate family (spouse or dependent children) was employed during the reporting period. (If “Yes”, complete Schedule G.)

Yes  No

- If your answer to the Schedule “G” is “Yes”, then please answer the follow-up questions.
- If your answer is “No”, the follow-up question will not be displayed.



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### 2. Answer Question 1.

1. What is the identity of the immediate family member employed (spouse or dependent children)?

\*Relationship

Select

- Select
- Spouse
- Son
- Daughter
- Child
- Other

### 1. If your answer is "Other", then please mention the relationship as follows.

1. What is the identity of the immediate family member employed (spouse or dependent children)?

\*Relationship List the relationship

Other v

### 3. Please answer to the following questions.

\*2. What is the title of the position held?

---

\*2a. What is the nature of the position held? \*3. What is the name of the employer?

---

3a. What is the address of the employer?

Address County State

### 4. Click the Save button to submit your Schedule G information.

## 3.9 Schedule H – Organizations

### 1. Do you have information to report on Schedule H? Select "Yes" or "No".

**Charitable, Religious, Educational**

\*H. I was an officer, director, or trustee of a charitable, religious, or educational organization during the reporting period. (If "Yes", complete Schedule H.)

Yes  No

- If your answer is "Yes", then follow-up questions will be displayed.
- If your answer is "No", then follow-up questions will not be displayed.




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2. Answer the following questions and click Save button.

| Charitable, Religious, Educational                   |   |
|--|---|
| 1. What is the name and address of the organization? |   |
| *Name  |   |
| <hr/>  |   |
| *Address   | Address 2 (suite, etc.)                   |
| <hr/>  | <hr/>                                     |
| *City  | *Zip                                      |
| <hr/>  | <hr/>                                     |
| *State   |   |
| <hr/>  | <hr/>                                     |
| *2a. What is the title of position held?             | *2b. What is the nature of position held? |
| <hr/>  | <hr/>                                     |

3. Click the Save button  to submit your Schedule H information.

### 3.10 Schedule I – Optional


1. Do you have information to report on Schedule I? Select “Yes” or “No”.

| Other  |
|--|
| *1. Is additional information set forth on Schedule I?               |
| <input type="button" value="Yes"/> <input type="button" value="No"/> |
| <hr/>  |

- If your answer is “Yes”, then follow-up questions will be displayed.
- If your answer is “No”, then follow-up questions will not be displayed.

2. Please enter the additional information

|   |
|---|
| Is there any additional information or interest you would like to disclose?     |
| <input checked="" type="button" value="Yes"/> <input type="button" value="No"/> |
| Additional information  |
| <hr/>   |

3. Click the Save button  to submit your Schedule I information.

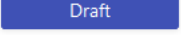
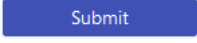


# Administrative Office of the Courts

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### 3.11 Submission

1. Click the Draft button  to save your filing.
2. Click the Submit button  to submit your filing for review by staff of the Administrative Office of the Courts.