



For Official Use Only

FINANCIAL DISCLOSURE REPORT

This statement is filed in accordance with Chapter 12A of the Dallas City Code. Copies of the applicable code sections and additional copies of this form may be obtained from the City Secretary's office.

See page 8 of this form for the list of persons required to file a financial disclosure report.

Please print or type all information. Attach additional pages if more space is needed.

Date of Report: ___/___/___

Type of Report: Initial Annual

Reporting Period: From: ___/___/___ Through: ___/___/___

Reporting Party (Check One)		Fill in Appropriate Information
<input type="checkbox"/>	Appointed Official	Board or Commission/ Title
<input type="checkbox"/>	City Employee	Title/Department

1. Name of Reporting Party:

2. Please give the full name(s) of your spouse or domestic partner, and your dependents.

<u>Name</u>	<u>Relationship</u>

3. Please list the names under which you and all persons listed in Item 2 do business.

4. Please list the name(s) of your employer(s) and the names of all employers for all persons listed in Item 2.

5. Please list each source of income amounting to more than \$300 received in the preceding calendar year by you or any person listed in Item 2.

6. Please list the name of each business entity (including self-employment in the form of a sole proprietorship under a personal or assumed name) in which you or any person listed in Item 2 has an investment of more than \$1000 at the fair market value **as of the date of this report**. Please describe each investment.

<u>Name of Business Entity</u>	<u>Description of Investment</u>

7. Please list the name of each nonprofit or business entity in which you or a person listed in Item 2 is a partner, manager, director, officer, or board member, or serves in any other policymaking position.

<u>Name of Business/Nonprofit Entity</u>	<u>Position Held</u>

8. Please list the name of any business entity that is a partner, parent, or subsidiary of a business entity owned, operated, or managed by you or a person listed in Item 2.

<u>Business Entity Owned, Operated, or Managed by You or a Person Listed in Item 2</u>	<u>Partner, Parent, or Subsidiary</u>

9. Please list the name of any person or business entity from whom, within the previous calendar year, you or your spouse or domestic partner, directly or indirectly, has: a) received and not rejected an offer of employment; or b) accepted an offer of employment that is binding or expected by the parties to be carried out.

<u>Person/Business Entity Making Offer</u>	<u>Person Receiving/Accepting Offer</u>

- 10.** Please list (by exact street address, or if no street address is ascertainable by lot-and-block description) all real property* located within the State of Texas in which you or a person listed in Item 2 has: a) a leasehold interest; b) a contractual right to purchase; or c) an interest as a fee simple owner, a beneficial owner, a partnership owner, a joint owner with an individual or a corporation, or an owner of more than 25 percent of a corporation that has title to the real property.

<u>Description of Property (address, etc.)</u>	<u>Type of Interest or Ownership</u>

- * You are not required to list the following properties:
- a) Property used as the personal residence of a peace officer.
 - b) Property over which you have no decision power concerning acquisitions or sales.
 - c) Property held through a real estate investment trust, mutual fund, or similar entity, unless you or a person listed in Item 2 participates in the management of the trust, fund, or entity.

- 11.** Please list the names of all persons or entities to whom you or a person listed in Item 2 owes an unsecured debt of more than \$5000 [do not include: a) money borrowed from a relative; or b) revolving charge accounts].

12. Please list the names of all persons or entities who owe you or a person listed in Item 2 an unsecured debt of more than \$5000 (do not include debts owed by a relative).

13. Please list the source of each gift or accumulation of gifts from one source of more than \$300 in estimated fair market value received by you or a person listed in Item 2, or received by a person for the use or benefit of you or a person listed in Item 2, within the preceding calendar year and the estimated fair market value of each gift. *

<u>Source of Gift(s)</u>	<u>Estimated Fair Market Value</u>

* This requirement does not include:

- a) a gift received from a relative if given on account of kinship, or from a domestic partner, if given on account of personal relationship;
- b) a gift received by will, by intestate succession, or as distribution from an inter vivos or testamentary trust established by a spouse, a domestic partner, or ancestor;
- c) gifts received among and between fellow city officials and city employees;
- d) a lawful campaign or officeholder contribution reported as required by Chapter 254 of the Texas Election Code; and
- e) admission to an event in which you are participating in connection with official duties.

Have any additional or supplemental pages been attached to this report? Yes__ No__
 If additional or supplemental pages have been attached, please identify each page with your name and the item number to which the information on the supplemental page refers.

OATH

This report (including any accompanying supplements) to the best of my knowledge and belief is true, correct, and complete.

Signature of Reporting Party

SWORN to and subscribed before me by _____

on this the ____ day of _____, 20____, to certify
which, witness my hand and seal of office.

<NOTARY SEAL>

Signature of officer administering oath

Printed name of officer administering oath

Title of officer administering oath

Persons required to file Financial Disclosure Reports under Chapter 12A of the Dallas City Code:

City of Dallas appointed members to the following boards, commissions and committees:

- Board of adjustment and board of adjustment alternate members.
- Building inspection advisory, examining, and appeals board.
- Business development corporation board.
- City plan and zoning commission.
- Civil service board and civil service board adjunct members.
- Community development commission.
- Dallas Area Rapid Transit board.
- Dallas-Fort Worth international airport board.
- Ethics advisory commission.
- Fire code advisory and appeals board.
- Housing finance corporation board.
- Landmark commission and landmark commission alternate members.
- Park and recreation board.
- Permit and license appeal board.
- All reinvestment zone boards.
- All municipal management district boards.
- The first assistant city attorney
- The inspector general
- The city auditor and city secretary, and their first assistants.
- Assistant city managers and chiefs
- Municipal judges
- Chief financial officer

The following persons are required to file Personal Financial Statements under Chapter 145 of the Texas Local Government **(not this form)**:

- The mayor and city council members
- The city attorney
- The city manager
- Candidates for city council