BOARD OF EDUCATION OF QUEEN ANNE'S COUNTY
115 Vincit Street, Centreville, MD 21617
(410)758-2403

FINANCIAL DISCLOSURE FORM

☐

I Would Like To Be Notified If Someone Looks At My Form

This form is to be used by members of the Board of Education of Queen Anne's County ("BOARD") and employees of Queen Anne's County Public Schools ("QACPS") as required by the Board.

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.

Regular Reporting Period: January 1 through December 31, **2025**
or
*Termination Report: January 1 through _____, **20__***

PLEASE PRINT OR TYPE

FIRST NAME	INITIAL	LAST NAME
CURRENT POSITION OR OFFICE HELD WITH the Board OR QACPS, IF ANY *(OR OFFICE FOR CANDIDACY)*		
E-MAIL ADDRESS		

This financial disclosure statement describes all interests and related transactions and matters required to be disclosed by Board of Education of Queen Anne's County Policy and Administrative Regulation 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.

		YES	NO
A. I held interests during the reporting period in real property located in or outside Maryland. (If "Yes," complete Schedule A.)	**A.**		
B. I held interests during the reporting period in corporations, partnerships and similar entities. (If "Yes," complete Schedule B.)	**B.**		
C. I held interests in a non-corporate business entity which did business with the Board or QACPS, other than a partnership. (If "Yes," complete Schedule C.)	**C.**		
D. I received gifts during the reporting period from persons doing business with the Board or QACPS, regulated by the Board or QACPS, or registered or required to register as lobbyists. (If "Yes," complete Schedule D.)	**D.**		
E. I or a member of my immediate family (spouse and/or dependent child) was a partner or held an office, directorship, or salaried employment during the reporting period in or with a business entity doing business with the Board or QACPS. (If "Yes," complete Schedule E.)	**E.**		
F. I or a member of my immediate family (spouse and/or dependent child) owed debts (excluding retail credit accounts) during the reporting period to persons doing business with the Board or QACPS. (If "Yes," complete Schedule F.)	**F.**		
G. A member of my immediate family (spouse and/or dependent child) was employed by the Board or QACPS during the reporting period. (If "Yes," complete Schedule G.)	**G.**		
H. I or a member of my immediate family (spouse and/or dependent child) 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.)	**H.**		
I. Is additional information set forth on Schedule I? (If "Yes," complete Schedule I.)	**I.**		

Form 1

Schedule A – Real Property Interests

Do you have any interest (**as an owner or a tenant**, including interests in timeshares) in real property in Maryland or in any other state or country?

___ Yes
___ No (Go to Schedule B)

<u>If Yes:</u> (Answer each question below. A separate Schedule A will be required for each property you need to disclose.)

1. What is the address or legal description of the property? (Give Street Address, if you know it. If the property is your primary residence, you may enter the lot and block legal description instead, if you wish)
Street Address _____
City/State/Zip _____

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?

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)

-Select One-

- Below $25,000
- $25,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- $100,000 to $124,999
- $125,000 to $149,999
- $150,000 to $199,999
- $200,000 to $249,999
- $250,000 to $299,999
- $300,000 to $349,999
- $350,000 to $399,999
- $400,000 to $449,999
- $450,000 to $499,999
- $500,000 to $749,000
- $750,000 to $999,999
- $1,000,000 and Over
- N/A

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:-Select One-

- Under 3%
- 3-9%
- 10-24%
- 25-49%
- 50-74%
- 75-99%
- 100%
- N/A

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

-Select One-

- Below $25,000
- $25,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- $100,000 to $124,999
- $125,000 to $149,999
- $150,000 to $199,999
- $200,000 to $249,999
- $250,000 to $299,999
- $300,000 to $349,999
- $350,000 to $399,999
- $400,000 to $449,999
- $450,000 to $499,999
- $500,000 to $749,000
- $750,000 to $999,999
- $1,000,000 and Over

- N/A

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

___ 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 Paragraph E of 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:

-Select One-

- Under 3%
- 3-9%
- 10-24%
- 25-49%

- 50-74%
- 75-99%
- 100%
- N/A

5. What number of shares do you own? (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.

Name and number of stock, notes, bonds, puts, calls, straddles, purchase options, etc.:

_____	_____	_____
-Select One- • Under 100 • 100 to 249 • 250 to 499 • 500 to 749 • 750 to 999 • 1,000 and over • N/A Percentage of Ownership: ____%	-Select One- • Under 100 • 100 to 249 • 250 to 499 • 500 to 749 • 750 to 999 • 1,000 and over • N/A Percentage of Ownership: ____%	-Select One- • Under 100 • 100 to 249 • 250 to 499 • 500 to 749 • 750 to 999 • 1,000 and over • N/A 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 <u>acquire</u> an interest in the entity during the reporting period?

___ Yes
___ No

<u>If Yes;</u>

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 number of shares was acquired?

Name and number of stock, notes, bonds, puts, calls, straddles, purchase options, etc.:

_____	_____	_____
-Select One- • Under 100 • 100 to 249 • 250 to 499 • 500 to 749 • 750 to 999 • 1,000 and over • N/A	-Select One- • Under 100 • 100 to 249 • 250 to 499 • 500 to 749 • 750 to 999 • 1,000 and over • N/A	-Select One- • Under 100 • 100 to 249 • 250 to 499 • 500 to 749 • 750 to 999 • 1,000 and over • N/A
Percentage of Ownership: ___%	Percentage of Ownership: __%	Percentage of Ownership: ____%

8. Have you <u>transferred</u> any interest in this entity during the reporting period?

___ Yes
___ No

<u>If Yes;</u>

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

-Select One-

- Under 100
- 100 to 249
- 250 to 499
- 500 to 749

- 750 to 999
- 1,000 and over
- N/A

Percentage of

Ownership: ___% _____

-Select One-

- Under 100
- 100 to 249
- 250 to 499
- 500 to 749
- 750 to 999
- 1,000 and over
- N/A

Percentage of

Ownership: __% _____

-Select One-

- Under 100
- 100 to 249
- 250 to 499
- 500 to 749
- 750 to 999
- 1,000 and over
- N/A

Percentage of Ownership: ____%

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):

-Select One-

- Under $1,000
- $1,000 to $4,999
- $5,000 to $9,999
- $10,000 to $14,999
- $15,000 to $19,999

- $20,000 to $24,999
- $25,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- $100,000 and Over
- N/A

OR

-Select One-

- Under 3%
- 3-9%
- 10-24%
- 25-49%
- 50-74%
- 75-99%
- 100%
- N/A

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

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 Non-Corporate Business Entities Doing Business with the Board or QACPS

Do you have an interest in any non-corporate business entity (a sole proprietorship) that did business with the Board or QACPS during the reporting period?

___ Yes
___ No (Go to Schedule D)

<u>If Yes;</u> (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 Paragraph E of 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:

-Select One-

- Under 3%
- 3-9%
- 10-24%
- 25-49%
- 50-74%
- 75-99%
- 100%
- N/A

3.B. Dollar value of your interest in the entity:

-Select One-

- Under $1,000
- $1,000 to $4,999
- $5,000 to $9,999
- $10,000 to $14,999
- $15,000 to $19,999
- $20,000 to $24,999
- $25,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- $100,000 and Over
- N/A

or percentage of your interest in the entity:

-Select One-

- Under 3%
- 3-9%
- 10-24%
- 25-49%
- 50-74%
- 75-99%
- 100%
- N/A

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 <u>acquired</u> 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)

-Select One-

- Under $1,000
- $1,000 to $4,999
- $5,000 to $9,999
- $10,000 to $14,999
- $15,000 to $19,999
- $20,000 to $24,999
- $25,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- $100,000 and Over
- N/A

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? -Select One-

- Under 3%
- 3-9%
- 10-24%
- 25-49%

- 50-74%
- 75-99%
- 100%
- N/A

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):

-Select One-

- Under $1,000
- $1,000 to $4,999
- $5,000 to $9,999
- $10,000 to $14,999
- $15,000 to $19,999
- $20,000 to $24,999
- $25,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- $100,000 and Over
- N/A

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

If you have additional interests in sole proprietorship(s) that did business with the Board or QACPS 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

On or before April 30 of each year during which an employee holds employment, an employee shall file a statement disclosing gifts received during the preceding calendar year from any person that contracts with or is under the authority of the Board or the QACPS, including the name of the donor of the gift and the approximate retail value at the time of receipt.

During the calendar year ending December 31, 2023, I received the following gifts with the retail value at time of receipt noted:

☐ Not applicable.

Donor	Retail Value
_____	_____
_____	_____
_____	_____
_____	_____

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 Board or QACPS?

___ 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 the Board or QACPS department(s) did the business entity do business?_____

6. What was the nature of the business? (Example: regulated by the Board or QACPS, registered under the lobbying law, or involved with sales and contracts with the Board or QACPS)

_____

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 Board or QACPS? **[NOTE: If, on Schedule A, B or C you listed a financial entity that did business with the Board or QACPS 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)

<u>If Yes</u>; (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:

-Select One-

- Under 5%
- 5-7 1/2%
- Up to 10%
- More than 10%
- N/A

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

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

-Select One-

- $0
- Less than $1,000
- $1,000 to $9,999
- $10,000 to $24,999
- $25,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- $100,000 and Over
- N/A

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

-Select One-

- $0
- Less than $1,000
- $1,000 to $9,999
- $10,000 to $24,999
- $25,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- $100,000 and Over
- N/A

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 QACPS

During the reporting period, were any members of your immediate family (spouse or dependent children) employed by QACPS in any capacity?

___ Yes
___ No (Go to Schedule H)

<u>If Yes</u>; (Answer each question below. A separate Schedule G will be required for each member of the immediate family who is employed by.)

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

_____

2. What was the title of your immediate family member's position QACPS 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 Board or QACPS? 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 agency or has contracts in excess of $10,000 with the Board or QACPS.

___ Yes
___ No (Go to Schedule I)

<u>If Yes:</u> (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: _____

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

Schedule I – Other

Is there any additional information or interest you would like to disclose? ___ Yes ___ No

Please return on or before April 30, 2026 to:
Board of Education of Queen Anne's County
Attn: Kari Denis
202 Chesterfield Avenue, Centreville, MD 21617
(410) 758-2403; 1-800-336-7775
www.qacps.org

NOTICE: The Board of Education of Queen Anne's County ethics policy, administrative regulation, and exhibits may be accessed on-line at:

STANDARDS OF CONDUCT

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 Board or QACPS, and procurement specifications assistance restrictions. The administrative regulation provides for exceptions and exemptions under certain circumstances.

Filers wanting more detailed information about these requirements should contact the office of the Superintendent.