

**Schedule B – Interests in Corporations (Including Limited Liability Corporations (LLCs))**

Did you have any interest in any entities, partnerships, limited liability partnerships (LLP) or limited liability companies (LLC) during the reporting period that met the following criteria:

- A. interests of greater than 1 percent in entities regulated or licensed by your board or commission;
- B. interests of greater than 1 percent in entities negotiating a contract or having a contract with your board or commission that involve doing business with the State, Employees' Retirement System (ERS), Montgomery County or Prince George's County, in the amount of \$5,000 or more annually;
- C. interests of greater than 1 percent in entities that do business with your board or commission;
- D. 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; or
- E. 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?

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 and address of the entity?

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

2. Is the interest held directly by you or is it attributable to you?

Directly: \_\_\_\_\_ Attributable: \_\_\_\_\_

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

In your name solely: \_\_\_\_\_ Jointly: \_\_\_\_\_

If jointly, the % of your joint interest: \_\_\_\_\_%

5. What is the type of interest and its dollar value or the number of shares? (Example: stock, notes, bonds, puts, calls, straddles, purchase options, etc.)

Type: \_\_\_\_\_ Dollar Value/# of Shares \_\_\_\_\_

6. If in a non-publicly traded entity or LLP or LLC, select the percentage of ownership.

Percentage of ownership: \_\_\_\_\_%

7. If in a publicly traded entity or LLP or LLC, indicate either the number of shares or the range of the value of the interest:

Number of Shares: \_\_\_\_\_ or

Value of Shares:

\_\_\_\_\_ Under \$1,000

\_\_\_\_\_ \$1,000 to \$9,999

\_\_\_\_\_ \$10,000 to \$24, 999

\_\_\_\_\_ \$25,000 to \$49,999

\_\_\_\_\_ \$50,000 and over

8. Did you transfer all or part of your holdings during the reporting period?

Yes

No

**If Yes;**

8A. What portion of the interest was transferred if less than all? \_\_\_\_\_ %

8B. Date the interest was transferred: \_\_\_\_\_

**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.**