

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, the Employees' Retirement System (ERS), the M-NCPPC, 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.