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Name

**RETURN TO:** DANE COUNTY CLERK  
210 MARTIN LUTHER KING, JR. BLVD.  
ROOM 106  
MADISON, WI 53703

# COUNTY OF DANE

## STATEMENT OF ECONOMIC INTERESTS



The Dane County Code of Ordinances requires certain employees and elected officials complete this form. Please refer to the attached instructions for guidance.

As you fill out the form, keep in mind that every time you answer a question "NO" stop. Do nothing further with that question and go directly to the next Roman-numbered question.



\_\_\_\_\_  
Name

**III** Did you or any member of your immediate family receive income of more than \$5,000 from any particular source during the taxable year preceding the present one? This includes income from employment.

\_\_\_\_\_ YES – Complete below.      \_\_\_\_\_ NO – Got to Item IV.

| NAME OF SOURCE | ADDRESS (City and State) |
|----------------|--------------------------|
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |

**IV** Do you or any member of your immediate family owe more than \$5,000, severally or in aggregate, to any one creditor?

\_\_\_\_\_ YES – Complete below.      \_\_\_\_\_ NO – Got to Item V.

| NAME OF CREDITOR | ADDRESS (City and State) |
|------------------|--------------------------|
|                  |                          |
|                  |                          |
|                  |                          |
|                  |                          |
|                  |                          |

**V** Have you or any member of your immediate family received any gifts, directly or indirectly, totaling more than \$100 during the preceding taxable year from persons or organizations doing or having a legal, financial or business relationship with the County of Dane?

\_\_\_\_\_ YES – Complete below.      \_\_\_\_\_ NO – Got to Item VI.

| NAME OF DONOR | ADDRESS (City and State) |
|---------------|--------------------------|
|               |                          |
|               |                          |
|               |                          |
|               |                          |
|               |                          |

\_\_\_\_\_  
Name

**VI** Other than your principal residence, do you or any member of your immediate family own any real estate in Dane County?

\_\_\_\_\_ YES – Complete below. \_\_\_\_\_ NO – Got to Item VIII.

| STREET ADDRESS OF PROPERTY | TOWN/CITY/VILLAGE<br>WHERE LOCATED | NATURE OF OWNERSHIP<br>(Sole, Joint, etc.) |
|----------------------------|------------------------------------|--|
|                            |                                    |  |
|                            |                                    |  |
|                            |                                    |  |
|                            |                                    |  |
|                            |                                    |  |
|                            |                                    |  |
|                            |                                    |  |

**VII** Use this space if you need additional room for any of the items.

**VIII** I, the undersigned, do hereby verify that the information I have provided on this form is true and correct, to the best of my knowledge.

|            |                                |
|------------|--------------------------------|
| SIGNATURE  | DATE                           |
| PRINT NAME | COMMITTEE, COMMISSION OR BOARD |
| TITLE      | DEPARTMENT                     |

*Signature*

Witnessed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ By (name): \_\_\_\_\_

## INSTRUCTIONS FOR COMPLETING THE STATEMENT OF ECONOMIC INTERESTS FORM

### **PURPOSE**

This disclosure statement must be completed, pursuant to Section 9.60(1) of the Dane County Code of Ordinances, by all persons to whom the ordinance applies. Filing exemptions are also indicated in the ordinance. It is used to identify potential conflicts of interest that may arise during the course of completing county duties.

### **DEFINITIONS**

As of December 2005, the following definitions apply when completing the form:

*Immediate family* [DCO 9.03(1)(m)] – an individual’s spouse or domestic partner; AND any relative by marriage, lineal descent, or adoption who receives, directly or indirectly, more than one-half of his or her support from the individual; AND any relative by marriage, lineal descent, or adoption who provides, directly or indirectly, more than one-half of the individual’s support.

*Domestic partner* [DCO 9.03(1)(k)] – a person, other than a spouse, with whom a person cohabitates and shares a common domestic life.

### **RESPONSES**

#### **II. Ownership of securities.**

“Security” means stocks; treasury stocks; bonds; notes; debentures; evidence of indebtedness; share of beneficial interest in a business trust; certificate of interest or participation in any profit-sharing agreement; collateral trust certificate; pre-organization subscription; transferable share; investment contract; commodity futures contract; voting trust certificate; certificate of deposit for a security; limited partnership interests; certificate of interest or participation in an oil, gas, or mining title or lease, or in payments out of production under such a title or lease; or, in general, any interest or instrument commonly known as or having the incidents of security or offered in the manner in which securities are offered; or any certificate of interest or participation in temporary or interim certificate for, receipt for, guarantee of, or option, warrant or rights to subscribe to or purchase or sell, any of the foregoing.

DO NOT list certificates of deposit or a deposit in a mutual savings and loan association, mutual savings bank, credit union, or similar association organized under the laws of any state.

Also, DO NOT list any security issued by any government or instrumentality or agents of government or by an authority or public corporation created and regulated by an act of any government, other than the state of Wisconsin, its instrumentalities, agencies, and political subdivisions or authorities or public corporation created and regulated by an act of the legislature of this state.

#### **III. Income greater than \$5,000.**

List ALL sources of income greater than \$5,000. This includes employment, regardless of status (full-time/part-time, permanent/project/temporary).

#### **IV. Creditors.**

DO NOT list commercial lenders such as banks, savings and loan institutions, finance companies, credit unions, and other such enterprises regulated by the federal or state government.

#### **V. Donors (gifts).**

List only those donors whom you know to have a business, legal, or financial relationship to the County. Do not list the following donors: spouse, fiancé or fiancée, child, grandchild, parent, parent-in-law, grandparent, grandparent-in-law, brother, sister, brother or sister-in-law, aunt, uncle, niece or nephew, or roommate who lived with you more than six months during the past year.

#### **VI. Property ownership.**

DO NOT list any property in which your share is less than 10% of the total value of the property. Also, DO NOT list property where your share is worth less than \$5,000.