

FINANCIAL REPORTING CATEGORIES:

| | | | | | | |
|---------------------------------|--|--|---|---|--|-------------------------------------|
| A = \$0 (None) | B = Under < \$5000 | C = \$5,001 to \$20,000 | D = \$20,001 to \$60,000 | E= \$60,001 to \$100,000 | F= \$100,001 to \$250,000 | G = Over \$250,000 |
|---------------------------------|--|--|---|---|--|-------------------------------------|

2024 SCHENECTADY COUNTY FINANCIAL DISCLOSURE FORM

(For the Period January 1, 2024, to December 31, 2024)

PART C SUPPLEMENT: FINANCIAL ASSETS AND LIABILITIES

****Note: For Part C "Reporting Category" Equals the Value of Your Asset or Liability***
(Use only if additional space is needed and only complete applicable questions.)

First Name: _____ Last Name: _____

Email Address: _____ Phone #: _____

(C-1) List any additional individual or combined investments YOU have that are more than five percent (5%) of the total value, in any business, corporation, LLC, partnership, or other entity? THIS INCLUDES stocks, bonds, loans, pledge collateral, or other investments. DO NOT INCLUDE investments in retirement accounts.

***Entity Name:** _____ **Reporting Category:** _____

Entity Address: _____ % of Ownership Interest: _____

Does this entity have a contractual, regulatory other business relationship with Schenectady County?

☐ YES ☐ NO Please describe the entity's relationship to Schenectady County.

***Entity Name:** _____ **Reporting Category:** _____

Entity Address: _____ % of Ownership Interest: _____

Does this entity have a contractual, regulatory other business relationship with Schenectady County?

☐ YES ☐ NO Please describe the entity's relationship to Schenectady County.

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(C-1) Continued

***Entity Name:** _____ **Reporting Category:** _____

Entity Address: _____ % of Ownership Interest: _____

Does this entity have a contractual, regulatory other business relationship with Schenectady County?

☐ **YES** ☐ **NO** Please describe the entity's relationship to Schenectady County.

(C-2) List any FAMILY MEMBER's individual or combined investments more than five percent (5%) of the total value, in any business, corporation, LLC, partnership, or other entity? THIS INCLUDES stocks, bonds, loans, pledge collateral, or other investments. DO NOT INCLUDE investments in retirement accounts.

***Name of Family Member:** _____ **Reporting Category:** _____ **% Ownership:** _____

Entity Name & Address: _____

Does this entity have a contractual, regulatory other business relationship with Schenectady County?

☐ **YES** ☐ **NO** Please describe the entity's relationship to Schenectady County.

***Name of Family Member:** _____ **Reporting Category:** _____ **% Ownership:** _____

Entity Name & Address: _____

Does this entity have a contractual, regulatory other business relationship with Schenectady County?

☐ **YES** ☐ **NO** Please describe the entity's relationship to Schenectady County.

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(C-2) Continued

***Name of Family Member:** _____ **Reporting Category:** _____ **% Ownership:** _____

Entity Name & Address: _____

Does this entity have a contractual, regulatory other business relationship with Schenectady County?

☐ **YES** ☐ **NO** Please describe the entity's relationship to Schenectady County.

(C-3) List any additional ownership or interest that YOU hold in any property or real estate, **excluding your personal residence**, in Schenectady County? THIS INCLUDES interest or holdings through a Corporation, Trust, LLC, Partnership, or other entity.

***Property Address:** _____

Reporting Category _____ Joint with Spouse? ☐ **YES** ☐ **NO**

***Property Address:** _____

Reporting Category _____ Joint with Spouse? ☐ **YES** ☐ **NO**

***Property Address:** _____

Reporting Category _____ Joint with Spouse? ☐ **YES** ☐ **NO**

***Property Address:** _____

Reporting Category _____ Joint with Spouse? ☐ **YES** ☐ **NO**

(C-4) List any additional FAMILY MEMBER's ownership or interest in any property or real estate, in Schenectady County other than their personal residence or joint holdings listed above? THIS INCLUDES any interest or holdings through a Corporation, Trust, LLC, Partnership, or other entity. Do NOT include joint property or real estate listed above.

***Family Member's Name:** _____ **Reporting Category:** _____

Property Address: _____

***Family Member's Name:** _____ **Reporting Category:** _____

Property Address: _____

***Family Member's Name:** _____ **Reporting Category:** _____

Property Address: _____

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(C-5) List any additional monetary interest or other connection YOU have to any **contract** involving Schenectady County or municipal corporation located within the County? DO NOT INCLUDE employment or benefits contracts (e.g., union, health care).

***Contractor Name:** _____ **Reporting Category:** _____

Contractor Address: _____

Please describe YOUR financial interest in the contract, and any interaction with your Schenectady County position.

***Contractor Name:** _____ **Reporting Category:** _____

Contractor Address: _____

Please describe YOUR financial interest in the contract, and any interaction with your Schenectady County position.

***Contractor Name:** _____ **Reporting Category:** _____

Contractor Address: _____

Please describe YOUR financial interest in the contract, and any interaction with your Schenectady County position.

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(C-6) List any FAMILY MEMBER's additional monetary interest or other connection to any contract involving Schenectady County or municipal corporation located within the County? DO NOT INCLUDE employment or benefits contracts (e.g., union, health care).

***Family Member Name:** _____ **Reporting Category:** _____

Contractor Name &Address: _____

Please describe their financial interest in the contract, and any interaction with your County position.

***Family Member Name:** _____ **Reporting Category:** _____

Contractor Name &Address: _____

Please describe their financial interest in the contract, and any interaction with your County position.

(C-7) Please list any additional outstanding debts more than \$5,000 that YOU have with any single creditor/ guarantor? **INCLUDE:** Credit card and revolving charges/ loans, mortgages on real estate other than your primary residence, liens filed on property or real estate. **DO NOT INCLUDE:** Mortgage on your primary residence, student loans, loans from relatives, auto loans, or other liabilities incurred in the ordinary course of your trade, business, or professional practice.

***Name of Creditor/Guarantor:** _____ **Reporting Category:** _____

Creditor/Guarantor Address: _____

Description of Debt /Loan: _____ Joint w/ Spouse? ☐ YES ☐ NO

***Name of Creditor/Guarantor:** _____ **Reporting Category:** _____

Creditor/Guarantor Address: _____

Description of Debt /Loan: _____ Joint w/ Spouse? ☐ YES ☐ NO

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(C-7) Continued

***Name of Creditor/Guarantor:** _____ **Reporting Category:** _____

Creditor/Guarantor Address: _____

Description of Debt /Loan: _____ Joint w/ Spouse? ☐ YES ☐ NO

***Name of Creditor/Guarantor:** _____ **Reporting Category:** _____

Creditor/Guarantor Address: _____

Description of Debt /Loan: _____ Joint w/ Spouse? ☐ YES ☐ NO

(C-8) List any FAMILY MEMBERS' additional outstanding debts of more than \$5,000 with any single creditor (see guidance above). DO NOT INCLUDE Joint debts listed above.

***Name of Family Member:** _____

Name of Creditor/Guarantor: _____ **Reporting Category:** _____

Creditor/Guarantor Address: _____

Description of Debt /Loans: _____

***Name of Family Member:** _____

Name of Creditor/Guarantor: _____ **Reporting Category:** _____

Creditor/Guarantor Address: _____

Description of Debt /Loans: _____

***Name of Family Member:** _____

Name of Creditor/Guarantor: _____ **Reporting Category:** _____

Creditor/Guarantor Address: _____

Description of Debt /Loans: _____

***Name of Family Member:** _____

Name of Creditor/Guarantor: _____ **Reporting Category:** _____

Creditor/Guarantor Address: _____

Description of Debt /Loans: _____

END OF PART C-SUPPLEMENT