



Statement of Economic Interests Form

Instructions, Receipt and FAQ

CANDIDATES ONLY

Instructions

- You may find the following documents helpful in completing this form:
 - Federal income tax returns.
 - Including any related schedules, attachments, and forms.
 - Investment and brokerage statements.
- To complete this form, you do not need to...
 - Disclose specific amounts or values.
 - Report interests relating to political committees registered with the Illinois State Board of Elections, or political committees, principal campaign committees, or authorized committees registered with the Federal Election Commission.
 - The information you disclose will be available to the public.
- You must answer all 7 questions.
 - Certain questions will ask you to report any applicable assets or debts held in, or payable to, your name; held jointly by, or payable to, you with your spouse; or held jointly by, or payable to, you with your minor child.
- If you have any concerns about whether an interest should be reported, please consult your Department's Ethics Officer, if applicable (*See the State Officials and Employees Ethics Act, 5 ILCS 430*).
 - Please ensure that the information you provide is complete and accurate.
 - All filers, **including candidates**, without ethics counsel should consult an attorney.
 - The Cook County Clerk cannot provide legal advice.
- If you need more space than the form allows, please attach additional pages for your response.
- If you are subject to the State Officials and Employees Ethics Act, your Ethics Officer must review your Statement of Economic Interests before you file it.
- ✳ Failure to complete the statement in good faith and within the prescribed deadline may subject you to fines, imprisonment, or both.

Receipt of Statement of Economic Interests Form (CANDIDATES ONLY)

1. **Complete** the receipt information below.
2. **Bring this page**, with your completed Statement of Economic Interests Form, to the Cook County Clerk's office to be stamped and filed.

➤ List each office or position of employment for which this statement is filed below:

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- Receipt is hereby acknowledged of your Statement of Economic Interests.
- Filed pursuant to the Illinois Governmental Ethics Act.
 - Filed as of this date.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

*Cook County Stamp
Here*

FAQ

The Statement of Economic Interest, required by law to be filed by candidates for office, elected officials and certain government employees, has been changed by state law. There are new questions and requirements for disclosure.

➤ See ILCS 5 ILCS 420/Article 4a for a full list of specific legal filing requirements

To assist in completing a Statement of Economic Interest, the following information may be helpful:

- The law requires filers to disclose certain types of assets and debts.
 - **Assets that are subject to the requirements of disclosure** include stocks, bonds, sector mutual funds, sector exchange traded funds, real estate investments, beneficial interest in trusts, business interests and partnership interests.
 - **Assets that are NOT subject to the requirements of disclosure** include personal residences, personal vehicles, savings or checking accounts, bonds notes or securities issued by any branch of the government, Medicare benefits, inheritances, or bequests (other than beneficial interest in trusts), diversified funds, annuities, pensions, retirement accounts, qualified college savings plans, tax exempt disability plans, and tangible personal property.
 - **Debts that are subject to the requirements of disclosure** include any money or monetary obligation owed at any time during the preceding calendar year to an individual, company or other organization, personal loans from friends or business associates, business loans made outside a lender's regular course of business, and loans made below market interest rates.
 - **Debts that are NOT subject to the requirements of disclosure** include loans from a financial institution, government agency, or business entity that are granted on terms made available to the general public, mortgages, student loans, credit card debts or car loans.
- The definition of "[f]amily" includes a filer's spouse, children, stepchildren, parents, stepparents, siblings, step-siblings, sons and daughters in law, grandparents, grandchildren, as well as parents and grandparents of the filer's spouse, and any person living with the filer.
- This information is for informational purposes only.
 - All legal duties arise from the statutory language in ILCS 5 ILCS 420/Article 4a.



Statement of Economic Interests Form CANDIDATES ONLY

Cook County Stamp
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Basic Information

Name: _____

Full Mailing Address: _____

List each office or position of employment
for which this statement is filled: _____

Preferred email
Address (optional): _____

Questions

1. If you have any single asset that was worth more than \$10,000 as of the end of the preceding calendar year and is held in, or payable to, your name, held jointly by, or payable to, you with your spouse, or held jointly by, or payable to, you with your minor child, list such assets below. In the case of investment real estate, list the city and state where the investment real estate is located. If you do not have any such assets, list "none" below.

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2. Excluding the position for which you are required to file this form, list the source of any income in excess of \$7,500 required to be reported during the preceding calendar year. If you sold an asset that produced more than \$7,500 in capital gains in the preceding calendar year, list the name of the asset and the transaction date on which the sale or transfer took place. If you had no such sources of income or assets, list "none" below.

<u>Source of Income / Name of Asset</u>	<u>Date Sold (if applicable)</u>
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3. Excluding debts incurred on terms available to the general public, such as mortgages, student loans, and credit card debts, if you owed any single debt in the preceding calendar year exceeding \$10,000, list the creditor of the debt below. If you had no such debts, list "none" below. List the creditor for all applicable debts owed by you, owed jointly by you with your spouse, or owed jointly by you with your minor child. In addition to the types of debts listed above, you do not need to report any debts to or from financial institutions or government agencies, such as debts secured by automobiles, household furniture or appliances, as long as the debt was made on terms available to the general public, debts to members of your family, or debts to or from a political committee registered with the Illinois State Board of Elections or any political committee, principal campaign committee, or authorized committee registered with the Federal Election Commission.

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4. List the name of each unit of government of which you or your spouse were an employee, contractor, or office holder during the preceding calendar year other than the unit or units of government in relation to which the person is required to file and the title of the position or nature of the contractual services.

Name of Unit of Government

Title or Nature of Services

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5. If you maintain an economic relationship with a lobbyist or if a member of your family is known to you to be a lobbyist registered with any unit of government in the State of Illinois, list the name of the lobbyist below and identify the nature of your relationship with the lobbyist. If you do not have an economic relationship with a lobbyist or a family member known to you to be a lobbyist registered with any unit of government in the State of Illinois, list "none" below.

Name of Lobbyist

Relationship to Filer

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6. List the name of each person, organization, or entity that was the source of a gift or gifts, or honorarium or honoraria, valued singly or in the aggregate in excess of \$500 received during the preceding calendar year and the type of gift or gifts, or honorarium or honoraria, excluding any gift or gifts from a member of your family that was not known to be a lobbyist registered with any unit of government in the State of Illinois. If you had no such gifts, list "none" below.

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7. List the name of any spouse or immediate family member living with the person making this statement employed by a public utility in this State and the name of the public utility that employs the relative.

Name and Relation

Public Utility

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Verification

"I declare that this Statement of Economic Interests (including any attachments) has been examined by me and to the best of my knowledge and belief is a true, correct and complete statement of my economic interests as required by the Illinois Governmental Ethics Act. I understand that the penalty for willfully filing a false or incomplete statement is a fine not to exceed \$2,500 or imprisonment in a penal institution other than the penitentiary not to exceed one year, or both fine and imprisonment."

Name of Filer (print): _____

Date: _____

Signature: _____

Certification of Ethics Officer Review (State of Illinois Only)

If this Statement of Economic Interests requires ethics officer review prior to filing, the applicable ethics officer must complete the following: "In accordance with law, as Ethics Officer, I reviewed this Statement of Economic Interests prior to its filing."

Printed Name of Ethics Officer: _____ Date: _____

Preferred email address (optional): _____ Signature: _____