

# STATE OF NEW YORK

2578--A

2025-2026 Regular Sessions

## IN ASSEMBLY

January 17, 2025

Introduced by M. of A. McDONALD, WALSH, MORINELLO, LUPARDO -- Multi-Sponsored by -- M. of A. TAGUE -- read once and referred to the Committee on Governmental Operations -- committee discharged, bill amended, ordered reprinted as amended and recommitted to said committee

AN ACT to amend the public officers law, in relation to requiring legislators and candidates for member of the legislature to provide a link to their financial disclosure statements on their official state and campaign websites

The People of the State of New York, represented in Senate and Assembly, do enact as follows:

1 Section 1. The opening paragraph of paragraph (k) of subdivision 2 of  
2 section 73-a of the public officers law is designated subparagraph (i)  
3 and two new subparagraphs (ii) and (iii) are added to read as follows:

4 (ii) Notwithstanding any other provision of law to the contrary, all  
5 members of the legislature who maintain any state website for service in  
6 their official capacity shall establish a clearly visible link entitled  
7 "MY ANNUAL STATEMENT OF FINANCIAL DISCLOSURE" on the front page of their  
8 website which shall direct website visitors to their most recent redacted  
9 and searchable financial disclosure form that the legislator has  
10 received from the legislative ethics commission.

11 (iii) Notwithstanding any other provision of law to the contrary,  
12 every candidate for member of the legislature who maintains a website  
13 for service in their official campaign capacity shall establish a clearly  
14 visible link entitled "MY ANNUAL STATEMENT OF FINANCIAL DISCLOSURE"  
15 on the front page of their campaign website which shall direct visitors  
16 to their most recent redacted and searchable financial disclosure form  
17 that the candidate has received from the legislative ethics commission,  
18 in accordance with paragraph (a) of this subdivision.

EXPLANATION--Matter in italics (underscored) is new; matter in brackets  
[-] is old law to be omitted.

LBD03029-02-5

1 § 2. The opening paragraph of paragraph (a) of subdivision 2 of  
2 section 73-a of the public officers law, as amended by section 7 of part  
3 QQ of chapter 56 of the laws of 2022, is amended to read as follows:

4 Every statewide elected official, state officer or employee, member of  
5 the legislature, legislative employee and political party chair and  
6 every candidate for statewide elected office or for member of the legis-  
7 lature shall file an annual statement of financial disclosure containing  
8 the information and in the form set forth in subdivision three of this  
9 section. Every member of the legislature and candidate for member of the  
10 legislature must file their annual statement of financial disclosure in  
11 a searchable format, to be provided by the legislative ethics commis-  
12 sion. On or before the fifteenth day of May with respect to the preced-  
13 ing calendar year: (1) every member of the legislature, every candidate  
14 for member of the legislature and legislative employee shall file such  
15 statement with the legislative ethics commission which shall provide  
16 such statement along with any requests for exemptions or deletions to  
17 the commission on ethics and lobbying in government for filing and  
18 rulings with respect to such requests for exemptions or deletions, on or  
19 before the thirtieth day of June; and (2) all other individuals required  
20 to file such statement shall file it with the commission on ethics and  
21 lobbying in government, except that:

22 § 3. Subdivision 3 of section 73-a of the public officers law, as  
23 amended by section 18 of part QQ of chapter 56 of the laws of 2022,  
24 subparagraphs (b), (b-2) and (c) of paragraph 8 as separately amended by  
25 section 8 of part QQ of chapter 56 of the laws of 2022 and paragraph  
26 16-a as added by chapter 591 of the laws of 2023, is amended to read as  
27 follows:

28 3. (a) The annual statement of financial disclosure shall contain the  
29 information and shall be in the form set forth hereinbelow:

30 ANNUAL STATEMENT OF FINANCIAL DISCLOSURE - (For calendar year \_\_\_\_\_)

- 31 1. Name \_\_\_\_\_
- 32 2. (a) Title of Position \_\_\_\_\_
- 33 (b) Department, Agency or other Governmental Entity \_\_\_\_\_
- 34 (c) Address of Present Office \_\_\_\_\_
- 35 (d) Office Telephone Number \_\_\_\_\_
- 36 3. (a) Marital Status \_\_\_\_\_. If married, please give spouse's
- 37 full name.
- 38 \_\_\_\_\_.
- 39 (b) Full name of domestic partner (if applicable).
- 40 \_\_\_\_\_.
- 41 (c) List the names of all unemancipated children.

42 \_\_\_\_\_

43 \_\_\_\_\_

44 \_\_\_\_\_

45 \_\_\_\_\_

46 \_\_\_\_\_

47 Answer each of the following questions completely, with respect to  
48 calendar year \_\_\_\_\_, unless another period or date is otherwise  
49 specified. If additional space is needed, attach additional pages.

1 Whenever a "value" or "amount" is required to be reported herein, such  
2 value or amount shall be reported as being within one of the following  
3 Categories in Table I or Table II of this subdivision as called for in  
4 the question: A reporting individual shall indicate the Category by  
5 letter only.

6 Whenever "income" is required to be reported herein, the term "income"  
7 shall mean the aggregate net income before taxes from the source identi-  
8 fied.

9 The term "calendar year" shall mean the year ending the December 31st  
10 preceding the date of filing of the annual statement.

11 4. (a) List any office, trusteeship, directorship, partnership, or  
12 position of any nature, whether compensated or not, held by the  
13 reporting individual with any firm, corporation, association, part-  
14 nership, or other organization other than the State of New York.  
15 Include compensated honorary positions; do NOT list membership or  
16 uncompensated honorary positions. If the listed entity was licensed  
17 by any state or local agency, was regulated by any state regulatory  
18 agency or local agency, or, as a regular and significant part of the  
19 business or activity of said entity, did business with, or had  
20 matters other than ministerial matters before, any state or local  
21 agency, list the name of any such agency.

|          |              | State or<br>Local Agency |
|----------|--------------|--------------------------|
| Position | Organization |                          |
| 22       |              |                          |
| 23       |              |                          |
| 24       | _____        |                          |
| 25       | _____        |                          |
| 26       | _____        |                          |
| 27       | _____        |                          |
| 28       | _____        |                          |

29 (b) List any office, trusteeship, directorship, partnership, or position  
30 of any nature, whether compensated or not, held by the spouse,  
31 domestic partner or unemancipated child of the reporting individual,  
32 with any firm, corporation, association, partnership, or other  
33 organization other than the State of New York. Include compensated  
34 honorary positions; do NOT list membership or uncompensated honorary  
35 positions. If the listed entity was licensed by any state or local  
36 agency, was regulated by any state regulatory agency or local agen-  
37 cy, or, as a regular and significant part of the business or activi-  
38 ty of said entity, did business with, or had matters other than  
39 ministerial matters before, any state or local agency, list the name  
40 of any such agency.

|          |              | State or<br>Local Agency |
|----------|--------------|--------------------------|
| Position | Organization |                          |
| 41       |              |                          |
| 42       |              |                          |
| 43       | _____        |                          |
| 44       | _____        |                          |
| 45       | _____        |                          |
| 46       | _____        |                          |
| 47       | _____        |                          |

48 5. (a) List the name, address and description of any occupation,  
49 employment (other than the employment listed under Item 2 above),

1 trade, business or profession engaged in by the reporting individ-  
 2 ual. If such activity was licensed by any state or local agency, was  
 3 regulated by any state regulatory agency or local agency, or, as a  
 4 regular and significant part of the business or activity of said  
 5 entity, did business with, or had matters other than ministerial  
 6 matters before, any state or local agency, list the name of any such  
 7 agency.

| 8  |                          |             | State or |
|----|--------------------------|-------------|----------|
| 9  | Name & Address           |             | Local    |
| 10 | Position of Organization | Description | Agency   |
| 11 | _____                    |             |          |
| 12 | _____                    |             |          |
| 13 | _____                    |             |          |
| 14 | _____                    |             |          |
| 15 | _____                    |             |          |

16 (b) If the spouse, domestic partner or unemancipated child of the  
 17 reporting individual was engaged in any occupation, employment,  
 18 trade, business or profession which activity was licensed by any  
 19 state or local agency, was regulated by any state regulatory agency  
 20 or local agency, or, as a regular and significant part of the busi-  
 21 ness or activity of said entity, did business with, or had matters  
 22 other than ministerial matters before, any state or local agency,  
 23 list the name, address and description of such occupation, employ-  
 24 ment, trade, business or profession and the name of any such agency.

| 25 |                          |             | State or |
|----|--------------------------|-------------|----------|
| 26 | Name & Address           |             | Local    |
| 27 | Position of Organization | Description | Agency   |
| 28 | _____                    |             |          |
| 29 | _____                    |             |          |
| 30 | _____                    |             |          |
| 31 | _____                    |             |          |
| 32 | _____                    |             |          |

33 6. List any interest, in EXCESS of \$1,000, held by the reporting indi-  
 34 vidual, such individual's spouse, domestic partner or unemancipated  
 35 child, or partnership of which any such person is a member, or  
 36 corporation, 10% or more of the stock of which is owned or  
 37 controlled by any such person, whether vested or contingent, in any  
 38 contract made or executed by a state or local agency and include the  
 39 name of the entity which holds such interest and the relationship of  
 40 the reporting individual or such individual's spouse, domestic part-  
 41 ner or such child to such entity and the interest in such contract.  
 42 Do NOT include bonds and notes. Do NOT list any interest in any such  
 43 contract on which final payment has been made and all obligations  
 44 under the contract except for guarantees and warranties have been  
 45 performed, provided, however, that such an interest must be listed  
 46 if there has been an ongoing dispute during the calendar year for  
 47 which this statement is filed with respect to any such guarantees or  
 48 warranties. Do NOT list any interest in a contract made or executed  
 49 by a local agency after public notice and pursuant to a process for

1 competitive bidding or a process for competitive requests for  
2 proposals.

|   | Entity     | Relationship | Contracting  | Category      |
|---|------------|--------------|--------------|---------------|
| 3 | Self,      | Which Held   | to Entity    | State or      |
| 4 | Spouse,    | Interest in  | and Interest | Local         |
| 5 | Domestic   | Contract     | in Contract  | Agency        |
| 6 | Partner or |              |              | Value of      |
| 7 | Child      |              |              | Contract      |
| 8 |            |              |              | (In Table II) |

9 \_\_\_\_\_  
 10 \_\_\_\_\_  
 11 \_\_\_\_\_  
 12 \_\_\_\_\_  
 13 \_\_\_\_\_

14 7. List any position the reporting individual held as an officer of any  
 15 political party or political organization, as a member of any poli-  
 16 tical party committee, or as a political party district leader. The  
 17 term "party" shall have the same meaning as "party" in the election  
 18 law. The term "political organization" means any party or independ-  
 19 ent body as defined in the election law or any organization that is  
 20 affiliated with or a subsidiary of a party or independent body.

21 \_\_\_\_\_  
 22 \_\_\_\_\_  
 23 \_\_\_\_\_  
 24 \_\_\_\_\_  
 25 \_\_\_\_\_

26 8. (a) If the reporting individual practices law, is licensed by the  
 27 department of state as a real estate broker or agent or practices a  
 28 profession licensed by the department of education, or works as a member  
 29 or employee of a firm required to register pursuant to section one-e of  
 30 the legislative law as a lobbyist, describe the services rendered for  
 31 which compensation was paid including a general description of the prin-  
 32 cipal subject areas of matters undertaken by such individual and princi-  
 33 pal duties performed. Specifically state whether the reporting individ-  
 34 ual provides services directly to clients. Additionally, if such an  
 35 individual practices with a firm or corporation and is a partner or  
 36 shareholder of the firm or corporation, give a general description of  
 37 principal subject areas of matters undertaken by such firm or corpo-  
 38 ration.

39 \_\_\_\_\_  
 40 \_\_\_\_\_  
 41 \_\_\_\_\_  
 42 \_\_\_\_\_  
 43 \_\_\_\_\_

44 (b) APPLICABLE ONLY TO NEW CLIENTS OR CUSTOMERS FOR WHOM SERVICES ARE  
 45 PROVIDED ON OR AFTER JULY FIRST, TWO THOUSAND TWELVE AND BEFORE DECEMBER  
 46 THIRTY-FIRST, TWO THOUSAND FIFTEEN, OR FOR NEW MATTERS FOR EXISTING  
 47 CLIENTS OR CUSTOMERS WITH RESPECT TO THOSE SERVICES THAT ARE PROVIDED ON

1 OR AFTER JULY FIRST, TWO THOUSAND TWELVE AND BEFORE DECEMBER  
2 THIRTY-FIRST, TWO THOUSAND FIFTEEN:

3 If the reporting individual personally provides services to any person  
4 or entity, or works as a member or employee of a partnership or corpo-  
5 ration that provides such services (referred to hereinafter as a  
6 "firm"), then identify each client or customer to whom the reporting  
7 individual personally provided services, or who was referred to the firm  
8 by the reporting individual, and from whom the reporting individual or  
9 [~~his or her~~] the reporting individual's firm earned fees in excess of  
10 \$10,000 during the reporting period for such services rendered in direct  
11 connection with:

- 12 (i) A contract in an amount totaling \$50,000 or more from the state or  
13 any state agency for services, materials, or property;
- 14 (ii) A grant of \$25,000 or more from the state or any state agency  
15 during the reporting period;
- 16 (iii) A grant obtained through a legislative initiative during the  
17 reporting period; or
- 18 (iv) A case, proceeding, application or other matter that is not a  
19 ministerial matter before a state agency during the reporting period.

20 For purposes of this question, "referred to the firm" shall mean:  
21 having intentionally and knowingly taken a specific act or series of  
22 acts to intentionally procure for the reporting individual's firm or  
23 knowingly solicit or direct to the reporting individual's firm in whole  
24 or substantial part, a person or entity that becomes a client of that  
25 firm for the purposes of representation for a matter as defined in  
26 subparagraphs (i) through (iv) of this paragraph, as the result of such  
27 procurement, solicitation or direction of the reporting individual. A  
28 reporting individual need not disclose activities performed while  
29 lawfully acting pursuant to paragraphs (c), (d), (e) and (f) of subdivi-  
30 sion seven of section seventy-three of this article.

31 The disclosure requirement in this question shall not require disclo-  
32 sure of clients or customers receiving medical or dental services,  
33 mental health services, residential real estate brokering services, or  
34 insurance brokering services from the reporting individual or [~~his or~~  
35 ~~her~~] the reporting individual's firm. The reporting individual need not  
36 identify any client to whom [~~he or she~~] the reporting individual or [~~his~~  
37 ~~or her~~] the reporting individual's firm provided legal representation  
38 with respect to investigation or prosecution by law enforcement authori-  
39 ties, bankruptcy, or domestic relations matters. With respect to clients  
40 represented in other matters, where disclosure of a client's identity is  
41 likely to cause harm, the reporting individual shall request an  
42 exemption from the commission on ethics and lobbying in government  
43 pursuant to section ninety-four of the executive law, provided, however,  
44 that a reporting individual who first enters public office after July  
45 first, two thousand twelve, need not report clients or customers with  
46 respect to matters for which the reporting individual or [~~his or her~~]  
47 the reporting individual's firm was retained prior to entering public  
48 office.

| 49 Client | Nature of Services Provided |
|-----------|-----------------------------|
| 50 _____  |                             |
| 51 _____  |                             |
| 52 _____  |                             |
| 53 _____  |                             |
| 54 _____  |                             |

(b-1) APPLICABLE ONLY TO NEW CLIENTS OR CUSTOMERS FOR WHOM SERVICES ARE PROVIDED ON OR AFTER DECEMBER THIRTY-FIRST, TWO THOUSAND FIFTEEN, OR FOR NEW MATTERS FOR EXISTING CLIENTS OR CUSTOMERS WITH RESPECT TO THOSE SERVICES THAT ARE PROVIDED ON OR AFTER DECEMBER THIRTY-FIRST, TWO THOUSAND FIFTEEN (FOR PURPOSES OF THIS QUESTION, "SERVICES" SHALL MEAN CONSULTATION, REPRESENTATION, ADVICE OR OTHER SERVICES):

If the reporting individual receives income from employment reportable in question 8(a) and personally provides services to any person or entity, or works as a member or employee of a partnership or corporation that provides such services (referred to hereinafter as a "firm"), the reporting individual shall identify each client or customer to whom the reporting individual personally provided services, or who was referred to the firm by the reporting individual, and from whom the reporting individual or ~~his or her~~ the reporting individual's firm earned fees in excess of \$10,000 during the reporting period in direct connection with:

- (i) A contract in an amount totaling \$10,000 or more from the state or any state agency for services, materials, or property;
- (ii) A grant of \$10,000 or more from the state or any state agency during the reporting period;
- (iii) A grant obtained through a legislative initiative during the reporting period; or
- (iv) A case, proceeding, application or other matter that is not a ministerial matter before a state agency during the reporting period.

For such services rendered by the reporting individual directly to each such client, describe each matter that was the subject of such representation, the services actually provided and the payment received. For payments received from clients referred to the firm by the reporting individual, if the reporting individual directly received a referral fee or fees for such referral, identify the client and the payment so received.

For purposes of this question, "referred to the firm" shall mean: having intentionally and knowingly taken a specific act or series of acts to intentionally procure for the reporting individual's firm or having knowingly solicited or directed to the reporting individual's firm in whole or substantial part, a person or entity that becomes a client of that firm for the purposes of representation for a matter as defined in clauses (i) through (iv) of this subparagraph, as the result of such procurement, solicitation or direction of the reporting individual. A reporting individual need not disclose activities performed while lawfully acting in ~~his or her~~ the reporting individual's capacity as provided in paragraphs (c), (d), (e) and (f) of subdivision seven of section seventy-three of this article.

| Client | Matter | Nature of Services Provided | Category<br>of Amount<br>(in Table I) |
|--------|--------|-----------------------------|---------------------------------------|
|--------|--------|-----------------------------|---------------------------------------|

|    |       |
|----|-------|
| 47 | _____ |
| 48 | _____ |
| 49 | _____ |
| 50 | _____ |
| 51 | _____ |

(b-2) APPLICABLE ONLY TO NEW CLIENTS OR CUSTOMERS FOR WHOM SERVICES ARE PROVIDED ON OR AFTER DECEMBER THIRTY-FIRST, TWO THOUSAND FIFTEEN, OR FOR NEW MATTERS FOR EXISTING CLIENTS OR CUSTOMERS WITH RESPECT TO THOSE

1 SERVICES THAT ARE PROVIDED ON OR AFTER DECEMBER THIRTY-FIRST, TWO THOU-  
2 SAND FIFTEEN (FOR PURPOSES OF THIS QUESTION, "SERVICES" SHALL MEAN  
3 CONSULTATION, REPRESENTATION, ADVICE OR OTHER SERVICES):

4 (i) With respect to reporting individuals who receive ten thousand  
5 dollars or more from employment or activity reportable under question  
6 8(a), for each client or customer NOT otherwise disclosed or exempted in  
7 question 8 or 13, disclose the name of each client or customer known to  
8 the reporting individual to whom the reporting individual provided  
9 services: (A) who paid the reporting individual in excess of five thou-  
10 sand dollars for such services; or (B) who had been billed with the  
11 knowledge of the reporting individual in excess of five thousand dollars  
12 by the firm or other entity named in question 8(a) for the reporting  
13 individual's services.

| 14 Client | Services          | Category of Amount |
|-----------|-------------------|--------------------|
| 15        | Actually Provided | (in Table I)       |
|           |                   |                    |
|           |                   |                    |
|           |                   |                    |
|           |                   |                    |

16 FOLLOWING IS AN ILLUSTRATIVE, NON-EXCLUSIVE LIST OF EXAMPLES OF  
17 DESCRIPTIONS OF "SERVICES ACTUALLY PROVIDED":

- 18 \* REVIEWED DOCUMENTS AND CORRESPONDENCE;
- 19 \* REPRESENTED CLIENT (IDENTIFY CLIENT BY NAME) IN LEGAL PROCEEDING;
- 20 \* PROVIDED LEGAL ADVICE ON CLIENT MATTER (IDENTIFY CLIENT BY NAME);
- 21 \* CONSULTED WITH CLIENT OR CONSULTED WITH LAW
- 22 PARTNERS/ASSOCIATES/MEMBERS
- 23 OF FIRM ON CLIENT MATTER (IDENTIFY CLIENT BY NAME);
- 24 \* PREPARED CERTIFIED FINANCIAL STATEMENT FOR CLIENT (IDENTIFY
- 25 CLIENT BY NAME);
- 26 \* REFERRED INDIVIDUAL OR ENTITY (IDENTIFY CLIENT BY NAME) FOR
- 27 REPRESENTATION OR CONSULTATION;
- 28 \* COMMERCIAL BROKERING SERVICES (IDENTIFY CUSTOMER BY NAME);
- 29 \* PREPARED CERTIFIED ARCHITECTURAL OR ENGINEERING
- 30 RENDERINGS FOR CLIENT (IDENTIFY CUSTOMER BY NAME);
- 31 \* COURT APPOINTED GUARDIAN OR EVALUATOR (IDENTIFY COURT NOT CLIENT).

32 (ii) With respect to reporting individuals who disclosed in question  
33 8(a) that the reporting individual did not provide services to a client  
34 but provided services to a firm or business, identify the category of  
35 amount received for providing such services and describe the services  
36 rendered.

| 37 Services Actually Provided | Category of Amount (Table I) |
|-------------------------------|------------------------------|
|                               |                              |
|                               |                              |

38 A reporting individual need not disclose activities performed while  
39 lawfully acting in [~~his or her~~] the reporting individual's capacity as  
40 provided in paragraphs (c), (d), (e) and (f) of subdivision seven of  
41 section seventy-three of this article.

42 The disclosure requirement in questions (b-1) and (b-2) shall not  
43 require disclosing clients or customers receiving medical, pharmaceu-  
44 tical or dental services, mental health services, or residential real  
45 estate brokering services from the reporting individual or [~~his or her~~]  
46 the reporting individual's firm or if federal law prohibits or limits  
47 disclosure. The reporting individual need not identify any client to



1 whom [~~he or she~~] the reporting individual or [~~his or her~~] the reporting  
2 individual's firm provided legal representation with respect to investi-  
3 gation or prosecution by law enforcement authorities, bankruptcy, family  
4 court, estate planning, or domestic relations matters, nor shall the  
5 reporting individual identify individuals represented pursuant to an  
6 insurance policy but the reporting individual shall in such circum-  
7 stances only report the entity that provides compensation to the report-  
8 ing individual; with respect to matters in which the client's name is  
9 required by law to be kept confidential (such as matters governed by the  
10 family court act) or in matters in which the reporting individual  
11 represents or provides services to minors, the client's name may be  
12 replaced with initials. To the extent that the reporting individual, or  
13 [~~his or her~~] the reporting individual's firm, provided legal represen-  
14 tation with respect to an initial public offering, and professional  
15 disciplinary rules, federal law or regulations restrict the disclosure  
16 of information relating to such work, the reporting individual shall (i)  
17 disclose the identity of the client and the services provided relating  
18 to the initial public offering to the office of court administration,  
19 who will maintain such information confidentially in a locked box; and  
20 (ii) include in [~~his or her~~] the reporting individual's response to  
21 questions (b-1) and (b-2) that pursuant to this paragraph, a disclosure  
22 to the office of court administration has been made. Upon such time that  
23 the disclosure of information maintained in the locked box is no longer  
24 restricted by professional disciplinary rules, federal law or regu-  
25 lation, the reporting individual shall disclose such information in an  
26 amended disclosure statement in response to the disclosure requirements  
27 in questions (b-1) and (b-2). The office of court administration shall  
28 develop and maintain a secure portal through which information submitted  
29 to it pursuant to this paragraph can be safely and confidentially  
30 stored. With respect to clients represented in other matters not other-  
31 wise exempt, the reporting individual may request an exemption to  
32 publicly disclosing the name of that client from the commission on  
33 ethics and lobbying in government pursuant to section ninety-four of the  
34 executive law, or from the office of court administration. In such  
35 application, the reporting individual shall state the following: "My  
36 client is not currently receiving my services or seeking my services in  
37 connection with:

- 38 (i) A proposed bill or resolution in the senate or assembly during the  
39 reporting period;  
40 (ii) A contract in an amount totaling \$10,000 or more from the state  
41 or any state agency for services, materials, or property;  
42 (iii) A grant of \$10,000 or more from the state or any state agency  
43 during the reporting period;  
44 (iv) A grant obtained through a legislative initiative during the  
45 reporting period; or  
46 (v) A case, proceeding, application or other matter that is not a  
47 ministerial matter before a state agency during the reporting period."

48 In reviewing the request for an exemption, the commission on ethics  
49 and lobbying in government or the office of court administration may  
50 consult with bar or other professional associations and the legislative  
51 ethics commission for individuals subject to its jurisdiction and may  
52 consider the rules of professional conduct. In making its determination,  
53 the commission on ethics and lobbying in government or the office of  
54 court administration shall conduct its own inquiry and shall consider  
55 factors including, but not limited to: (i) the nature and the size of  
56 the client; (ii) whether the client has any business before the state;

1 and if so, how significant the business is; and whether the client has  
2 any particularized interest in pending legislation and if so how signif-  
3 icant the interest is; (iii) whether disclosure may reveal trade  
4 secrets; (iv) whether disclosure could reasonably result in retaliation  
5 against the client; (v) whether disclosure may cause undue harm to the  
6 client; (vi) whether disclosure may result in undue harm to the attor-  
7 ney-client relationship; and (vii) whether disclosure may result in an  
8 unnecessary invasion of privacy to the client.

9 The commission on ethics and lobbying in government or, as the case  
10 may be, the office of court administration shall promptly make a final  
11 determination in response to such request, which shall include an expla-  
12 nation for its determination. The office of court administration shall  
13 issue its final determination within three days of receiving the  
14 request. Notwithstanding any other provision of law or any professional  
15 disciplinary rule to the contrary, the disclosure of the identity of any  
16 client or customer in response to this question shall not constitute  
17 professional misconduct or a ground for disciplinary action of any kind,  
18 or form the basis for any civil or criminal cause of action or proceed-  
19 ing. A reporting individual who first enters public office after January  
20 first, two thousand sixteen, need not report clients or customers with  
21 respect to matters for which the reporting individual or [~~his or her~~]  
22 the reporting individual's firm was retained prior to entering public  
23 office.

24 (c) APPLICABLE ONLY TO NEW CLIENTS OR CUSTOMERS FOR WHOM SERVICES ARE  
25 PROVIDED ON OR AFTER DECEMBER THIRTY-FIRST, TWO THOUSAND FIFTEEN, OR FOR  
26 NEW MATTERS FOR EXISTING CLIENTS OR CUSTOMERS WITH RESPECT TO THOSE  
27 SERVICES THAT ARE PROVIDED ON OR AFTER DECEMBER THIRTY-FIRST, TWO THOU-  
28 SAND FIFTEEN:

29 If the reporting individual receives income of ten thousand dollars or  
30 greater from any employment or activity reportable under question 8(a),  
31 identify each registered lobbyist who has directly referred to such  
32 individual a client who was successfully referred to the reporting indi-  
33 vidual's business and from whom the reporting individual or firm  
34 received a fee for services in excess of five thousand dollars. Report  
35 only those referrals that were made to a reporting individual by direct  
36 communication from a person known to such reporting individual to be a  
37 registered lobbyist at the time the referral is made. With respect to  
38 each such referral, the reporting individual shall identify the client,  
39 the registered lobbyist who has made the referral, the category of value  
40 of the compensation received and a general description of the type of  
41 matter so referred. A reporting individual need not disclose activities  
42 performed while lawfully acting pursuant to paragraphs (c), (d), (e) and  
43 (f) of subdivision seven of section seventy-three of this article. The  
44 disclosure requirements in this question shall not require disclosing  
45 clients or customers receiving medical, pharmaceutical or dental  
46 services, mental health services, or residential real estate brokering  
47 services from the reporting individual or [~~his or her~~] the reporting  
48 individual's firm or if federal law prohibits or limits disclosure. The  
49 reporting individual need not identify any client to whom [~~he or she~~]  
50 the reporting individual or [~~his or her~~] the reporting individual's firm  
51 provided legal representation with respect to investigation or prose-  
52 cution by law enforcement authorities, bankruptcy, family court, estate  
53 planning, or domestic relations matters, nor shall the reporting indi-  
54 vidual identify individuals represented pursuant to an insurance policy  
55 but the reporting individual shall in such circumstances only report the  
56 entity that provides compensation to the reporting individual; with

1 respect to matters in which the client's name is required by law to be  
2 kept confidential (such as matters governed by the family court act) or  
3 in matters in which the reporting individual represents or provides  
4 services to minors, the client's name may be replaced with initials. To  
5 the extent that the reporting individual, or [~~his or her~~] the reporting  
6 individual's firm, provided legal representation with respect to an  
7 initial public offering, and federal law or regulations restricts the  
8 disclosure of information relating to such work, the reporting individ-  
9 ual shall (i) disclose the identity of the client and the services  
10 provided relating to the initial public offering to the office of court  
11 administration, who will maintain such information confidentially in a  
12 locked box; and (ii) include in [~~his or her~~] the reporting individual's  
13 response a statement that pursuant to this paragraph, a disclosure to  
14 the office of court administration has been made. Upon such time that  
15 the disclosure of information maintained in the locked box is no longer  
16 restricted by federal law or regulation, the reporting individual shall  
17 disclose such information in an amended disclosure statement in response  
18 to the disclosure requirements of this paragraph. The office of court  
19 administration shall develop and maintain a secure portal through which  
20 information submitted to it pursuant to this paragraph can be safely and  
21 confidentially stored. With respect to clients represented in other  
22 matters not otherwise exempt, the reporting individual may request an  
23 exemption to publicly disclosing the name of that client from the  
24 commission on ethics and lobbying in government pursuant to section  
25 ninety-four of the executive law, or from the office of court adminis-  
26 tration. In such application, the reporting individual shall state the  
27 following: "My client is not currently receiving my services or seeking  
28 my services in connection with:

29 (i) A proposed bill or resolution in the senate or assembly during the  
30 reporting period;

31 (ii) A contract in an amount totaling \$10,000 or more from the state  
32 or any state agency for services, materials, or property;

33 (iii) A grant of \$10,000 or more from the state or any state agency  
34 during the reporting period;

35 (iv) A grant obtained through a legislative initiative during the  
36 reporting period; or

37 (v) A case, proceeding, application or other matter that is not a  
38 ministerial matter before a state agency during the reporting period."

39 In reviewing the request for an exemption, the commission on ethics  
40 and lobbying in government or the office of court administration may  
41 consult with bar or other professional associations and the legislative  
42 ethics commission for individuals subject to its jurisdiction and may  
43 consider the rules of professional conduct. In making its determination,  
44 the commission on ethics and lobbying in government or the office of  
45 court administration shall conduct its own inquiry and shall consider  
46 factors including, but not limited to: (i) the nature and the size of  
47 the client; (ii) whether the client has any business before the state;  
48 and if so, how significant the business is; and whether the client has  
49 any particularized interest in pending legislation and if so how signif-  
50 icant the interest is; (iii) whether disclosure may reveal trade  
51 secrets; (iv) whether disclosure could reasonably result in retaliation  
52 against the client; (v) whether disclosure may cause undue harm to the  
53 client; (vi) whether disclosure may result in undue harm to the attor-  
54 ney-client relationship; and (vii) whether disclosure may result in an  
55 unnecessary invasion of privacy to the client.

1 The commission on ethics and lobbying in government or, as the case  
 2 may be, the office of court administration shall promptly make a final  
 3 determination in response to such request, which shall include an expla-  
 4 nation for its determination. The office of court administration shall  
 5 issue its final determination within three days of receiving the  
 6 request. Notwithstanding any other provision of law or any professional  
 7 disciplinary rule to the contrary, the disclosure of the identity of any  
 8 client or customer in response to this question shall not constitute  
 9 professional misconduct or a ground for disciplinary action of any kind,  
 10 or form the basis for any civil or criminal cause of action or proceed-  
 11 ing. A reporting individual who first enters public office after Decem-  
 12 ber thirty-first, two thousand fifteen, need not report clients or  
 13 customers with respect to matters for which the reporting individual or  
 14 ~~his or her~~ the reporting individual's firm was retained prior to  
 15 entering public office.

| 16 Client | Name of Lobbyist | Description<br>of Matter | Category of Amount<br>(in Table [I] I) |
|-----------|------------------|--------------------------|--|
| 17        |                  |                          |  |
| 18        |                  |                          |  |
| 19        |                  |                          |  |
| 20        |                  |                          |  |
| 21        |                  |                          |  |
| 22        |                  |                          |  |

23 (d) List the name, principal address and general description or the  
 24 nature of the business activity of any entity in which the reporting  
 25 individual or such individual's spouse or domestic partner had an  
 26 investment in excess of \$1,000 excluding investments in securities and  
 27 interests in real property.

28 9. List each source of gifts, EXCLUDING campaign contributions, in  
 29 EXCESS of \$1,000, received during the reporting period for which this  
 30 statement is filed by the reporting individual or such individual's  
 31 spouse, domestic partner or unemancipated child from the same donor,  
 32 EXCLUDING gifts from a relative. INCLUDE the name and address of the  
 33 donor. The term "gifts" does not include reimbursements, which term is  
 34 defined in item 10. Indicate the value and nature of each such gift.

| 35 Self,<br>36 Spouse,<br>37 Domestic<br>38 Partner<br>39 or Child | Name of<br>Donor | Address | Nature<br>of Gift | Category<br>of<br>Value of<br>Gift<br>(In Table I) |
|--|------------------|---------|-------------------|--|
| 40   |                  |         |                   |  |
| 41   |                  |         |                   |  |
| 42   |                  |         |                   |  |
| 43   |                  |         |                   |  |
| 44   |                  |         |                   |  |
| 45   |                  |         |                   |  |

46 10. Identify and briefly describe the source of any reimbursements for  
 47 expenditures, EXCLUDING campaign expenditures and expenditures in  
 48 connection with official duties reimbursed by the state, in EXCESS  
 49 of \$1,000 from each such source. For purposes of this item, the term  
 50 "reimbursements" shall mean any travel-related expenses provided by  
 51 nongovernmental sources and for activities related to the reporting

1 individual's official duties such as, speaking engagements, confer-  
2 ences, or factfinding events. The term "reimbursements" does NOT  
3 include gifts reported under item 9.

| 4 | Source | Description |
|---|--------|-------------|
| 5 | _____  | _____       |
| 6 | _____  | _____       |
| 7 | _____  | _____       |
| 8 | _____  | _____       |
| 9 | _____  | _____       |

10 11. List the identity and value, if reasonably ascertainable, of each  
11 interest in a trust, estate or other beneficial interest, including  
12 retirement plans (other than retirement plans of the state of New  
13 York or the city of New York), and deferred compensation plans  
14 (e.g., 401, 403(b), 457, etc.) established in accordance with the  
15 internal revenue code, in which the REPORTING INDIVIDUAL held a  
16 beneficial interest in EXCESS of \$1,000 at any time during the  
17 preceding year. Do NOT report interests in a trust, estate or other  
18 beneficial interest established by or for, or the estate of, a rela-  
19 tive.

| 20 | Identity | Category<br>of Value*<br>(In Table II) |
|----|----------|--|
| 21 | _____    | _____                                  |
| 22 | _____    | _____                                  |
| 23 | _____    | _____                                  |
| 24 | _____    | _____                                  |
| 25 | _____    | _____                                  |
| 26 | _____    | _____                                  |
| 27 | _____    | _____                                  |

28 \* The value of such interest shall be reported only if reasonably  
29 ascertainable.

30 12. (a) Describe the terms of, and the parties to, any contract, prom-  
31 ise, or other agreement between the reporting individual and any  
32 person, firm, or corporation with respect to the employment of such  
33 individual after leaving office or position (other than a leave of  
34 absence).

|    |       |
|----|-------|
| 35 | _____ |
| 36 | _____ |
| 37 | _____ |
| 38 | _____ |
| 39 | _____ |

40 (b) Describe the parties to and the terms of any agreement providing  
41 for continuation of payments or benefits to the REPORTING INDIVIDUAL  
42 in EXCESS of \$1,000 from a prior employer OTHER THAN the State.  
43 (This includes interests in or contributions to a pension fund,  
44 profit-sharing plan, or life or health insurance; buy-out agree-  
45 ments; severance payments; etc.)

|    |       |
|----|-------|
| 46 | _____ |
| 47 | _____ |

1 \_\_\_\_\_  
 2 \_\_\_\_\_  
 3 \_\_\_\_\_

4 13. List below the nature and amount of any income in EXCESS of \$1,000  
 5 from EACH SOURCE for the reporting individual and such individual's  
 6 spouse or domestic partner for the taxable year last occurring prior  
 7 to the date of filing. Each such source must be described with  
 8 particularity. Nature of income includes, but is not limited to, all  
 9 income (other than that received from the employment listed under  
 10 Item 2 above) from compensated employment whether public or private,  
 11 directorships and other fiduciary positions, contractual arrange-  
 12 ments, teaching income, partnerships, honorariums, lecture fees,  
 13 consultant fees, bank and bond interest, dividends, income derived  
 14 from a trust, real estate rents, and recognized gains from the sale  
 15 or exchange of real or other property. Income from a business or  
 16 profession and real estate rents shall be reported with the source  
 17 identified by the building address in the case of real estate rents  
 18 and otherwise by the name of the entity and not by the name of the  
 19 individual customers, clients or tenants, with the aggregate net  
 20 income before taxes for each building address or entity. The  
 21 receipt of maintenance received in connection with a matrimonial  
 22 action, alimony and child support payments shall not be listed.

| 23 | Self/<br>24 Spouse<br>25 or Domestic<br>26 Partner | Source | Nature | Category<br>of Amount<br>(In Table I) |
|----|--|--------|--------|---------------------------------------|
| 27 | _____  | _____  | _____  | _____                                 |
| 28 | _____  | _____  | _____  | _____                                 |
| 29 | _____  | _____  | _____  | _____                                 |
| 30 | _____  | _____  | _____  | _____                                 |
| 31 | _____  | _____  | _____  | _____                                 |

32 14. List the sources of any deferred income (not retirement income) in  
 33 EXCESS of \$1,000 from each source to be paid to the reporting indi-  
 34 vidual following the close of the calendar year for which this  
 35 disclosure statement is filed, other than deferred compensation  
 36 reported in item 11 hereinabove. Deferred income derived from the  
 37 practice of a profession shall be listed in the aggregate and shall  
 38 identify as the source, the name of the firm, corporation, partner-  
 39 ship or association through which the income was derived, but shall  
 40 not identify individual clients.

| 41 | Source | Category<br>of Amount<br>(In Table I) |
|----|--------|---------------------------------------|
| 44 | _____  | _____                                 |
| 45 | _____  | _____                                 |
| 46 | _____  | _____                                 |
| 47 | _____  | _____                                 |
| 48 | _____  | _____                                 |

1 15. List each assignment of income in EXCESS of \$1,000, and each trans-  
 2 fer other than to a relative during the reporting period for which  
 3 this statement is filed for less than fair consideration of an  
 4 interest in a trust, estate or other beneficial interest, securities  
 5 or real property, by the reporting individual, in excess of \$1,000,  
 6 which would otherwise be required to be reported herein and is not  
 7 or has not been so reported.

|    |                 |                |              |
|----|-----------------|----------------|--------------|
|    | 8 Item Assigned | Assigned or    | Category     |
| 9  | or Transferred  | Transferred to | of Value     |
| 10 |                 |                | (In Table I) |

11 \_\_\_\_\_  
 12 \_\_\_\_\_  
 13 \_\_\_\_\_  
 14 \_\_\_\_\_  
 15 \_\_\_\_\_

16 16. List below the type and market value of securities held by the  
 17 reporting individual or such individual's spouse or domestic partner  
 18 from each issuing entity in EXCESS of \$1,000 at the close of the  
 19 taxable year last occurring prior to the date of filing, including  
 20 the name of the issuing entity exclusive of securities held by the  
 21 reporting individual issued by a professional corporation. Whenever  
 22 an interest in securities exists through a beneficial interest in a  
 23 trust, the securities held in such trust shall be listed ONLY IF the  
 24 reporting individual has knowledge thereof except where the report-  
 25 ing individual or the reporting individual's spouse or domestic  
 26 partner has transferred assets to such trust for ~~[his or her]~~ the  
 27 reporting individual's benefit in which event such securities shall  
 28 be listed unless they are not ascertainable by the reporting indi-  
 29 vidual because the trustee is under an obligation or has been  
 30 instructed in writing not to disclose the contents of the trust to  
 31 the reporting individual. Securities of which the reporting individ-  
 32 ual or the reporting individual's spouse or domestic partner is the  
 33 owner of record but in which such individual or the reporting indi-  
 34 vidual's spouse or domestic partner has no beneficial interest shall  
 35 not be listed. Indicate percentage of ownership ONLY if the report-  
 36 ing person or the reporting person's spouse or domestic partner  
 37 holds more than five percent (5%) of the stock of a corporation in  
 38 which the stock is publicly traded or more than ten percent (10%) of  
 39 the stock of a corporation in which the stock is NOT publicly trad-  
 40 ed. Also list securities owned for investment purposes by a corpo-  
 41 ration more than fifty percent (50%) of the stock of which is owned  
 42 or controlled by the reporting individual or such individual's  
 43 spouse or domestic partner. For the purpose of this item the term  
 44 "securities" shall mean mutual funds, bonds, mortgages, notes, obli-  
 45 gations, warrants and stocks of any class, investment interests in  
 46 limited or general partnerships and certificates of deposits (CDs)  
 47 and such other evidences of indebtedness and certificates of inter-  
 48 est as are usually referred to as securities. The market value for  
 49 such securities shall be reported only if reasonably ascertainable  
 50 and shall not be reported if the security is an interest in a gener-  
 51 al partnership that was listed in item 8 (a) or if the security is  
 52 corporate stock, NOT publicly traded, in a trade or business of a



1 reporting individual or a reporting individual's spouse or domestic  
2 partner.

|    |          |         |          |                  |                 |
|----|----------|---------|----------|------------------|-----------------|
| 3  |          |         |          | Percentage       |                 |
| 4  |          |         |          | of corporate     |                 |
| 5  |          |         |          | stock owned      |                 |
| 6  |          |         |          | or controlled    | Category of     |
| 7  |          |         |          | (if more than    | Market Value    |
| 8  |          |         |          | 5% of pub-       | as of the close |
| 9  |          |         |          | licly traded     | of the          |
| 10 |          |         |          | stock, or        | taxable year    |
| 11 |          |         |          | more than        | last occurring  |
| 12 |          |         |          | 10% if stock     | prior to        |
| 13 | Self/    | Issuing | Type of  | not publicly     | the filing of   |
| 14 | Spouse   | Entity  | Security | traded, is held) | this statement  |
| 15 | or       |         |          |                  | (In Table II)   |
| 16 | Domestic |         |          |                  |                 |
| 17 | Partner  |         |          |                  |                 |

18 \_\_\_\_\_  
 19 \_\_\_\_\_  
 20 \_\_\_\_\_  
 21 \_\_\_\_\_  
 22 \_\_\_\_\_

23 16-a. List below the name and market value of digital assets held by  
 24 the reporting individual or such individual's spouse or domestic partner  
 25 in EXCESS of \$1,000 at the close of the taxable year last occurring  
 26 prior to the date of filing. Whenever an interest in digital assets  
 27 exists through a beneficial interest in a trust, the digital assets held  
 28 in such trust shall be listed ONLY IF the reporting individual has know-  
 29 ledge thereof except where the reporting individual or the reporting  
 30 individual's spouse or domestic partner has transferred assets to such  
 31 trust for ~~his or her~~ the reporting individual's benefit in which event  
 32 such digital assets shall be listed unless they are not ascertainable by  
 33 the reporting individual because the trustee is under an obligation or  
 34 has been instructed in writing not to disclose the contents of the trust  
 35 to the reporting individual. The digital assets of which the reporting  
 36 individual or the reporting individual's spouse or domestic partner is  
 37 the owner of record but in which such individual or the reporting indi-  
 38 vidual's spouse or domestic partner has no beneficial interest shall not  
 39 be listed. Also list digital assets owned for investment purposes by a  
 40 corporation more than fifty percent (50%) of the stock of which is owned  
 41 or controlled by the reporting individual or such individual's spouse or  
 42 domestic partner. For purposes of this subdivision, the following terms  
 43 shall have the following meanings:

- 44 (a) "Digital asset" shall mean an asset that is issued, transferred,  
 45 or both, using distributed ledger or blockchain technology, including,  
 46 but not limited to, digital currencies, digital coins, digital non-fun-  
 47 gible tokens or other similar assets.
- 48 (b) "Digital currency" shall mean any type of digital unit that is  
 49 used as a medium of exchange or a form of digitally stored value. Virtu-  
 50 al currency shall be broadly construed to include digital units of  
 51 exchange that: (i) have a centralized repository or administrator; (ii)  
 52 are decentralized and have no centralized repository or administrator;



1 or (iii) may be created or obtained by computing, manufacturing, or  
2 other similar effort.

3 (c) "Distributed ledger or blockchain technology" shall mean a ledger  
4 or database that stores shared state by maintaining it across a multi-  
5 plicity of devices belonging to different entities and securing it  
6 through a combination of cryptographic and consensus protocols, where  
7 the shared state serves to authenticate, record, share, and/or synchro-  
8 nize transactions involving digital assets or virtual currencies.

| 9  |           | Category of     |
|----|-----------|-----------------|
| 10 |           | Market Value    |
| 11 |           | as of the close |
| 12 |           | of the taxable  |
| 13 |           | year last       |
| 14 |           | occurring       |
| 15 |           | prior to        |
| 16 | Self/     | the filing of   |
| 17 | Spouse or | this statement  |
| 18 | Domestic  | (In Table II)   |
| 19 | Partner   |                 |
| 20 | <hr/>     |                 |
| 21 | <hr/>     |                 |
| 22 | <hr/>     |                 |
| 23 | <hr/>     |                 |
| 24 | <hr/>     |                 |

25 17. List below the location, size, general nature, acquisition date,  
26 market value and percentage of ownership of any real property in  
27 which any vested or contingent interest in EXCESS of \$1,000 is held  
28 by the reporting individual or the reporting individual's spouse or  
29 domestic partner. Also list real property owned for investment  
30 purposes by a corporation more than fifty percent (50%) of the stock  
31 of which is owned or controlled by the reporting individual or such  
32 individual's spouse or domestic partner. Do NOT list any real prop-  
33 erty which is the primary or secondary personal residence of the  
34 reporting individual or the reporting individual's spouse or domes-  
35 tic partner, except where there is a co-owner who is other than a  
36 relative.

| 37 | Self/       |          | Percentage | Category  |
|----|-------------|----------|------------|-----------|
| 38 | Spouse/     | General  | of         | of Market |
| 39 | Domestic    | Nature   | Ownership  | Value     |
| 40 | Partner     |          |            | (In       |
| 41 | Corporation | Location |            | Table II) |
| 42 | <hr/>       |          |            |           |
| 43 | <hr/>       |          |            |           |
| 44 | <hr/>       |          |            |           |
| 45 | <hr/>       |          |            |           |
| 46 | <hr/>       |          |            |           |

47 18. List below all notes and accounts receivable, other than from goods  
48 or services sold, held by the reporting individual at the close of  
49 the taxable year last occurring prior to the date of filing and  
50 other debts owed to such individual at the close of the taxable year  
51 last occurring prior to the date of filing, in EXCESS of \$1,000,  
52 including the name of the debtor, type of obligation, date due and

1 the nature of the collateral securing payment of each, if any,  
2 excluding securities reported in item 16 hereinabove. Debts, notes  
3 and accounts receivable owed to the individual by a relative shall  
4 not be reported.

|   |                |                       |               |
|---|----------------|-----------------------|---------------|
| 5 |                | Type of Obligation,   | Category      |
| 6 |                | Date Due, and Nature  | of            |
| 7 | Name of Debtor | of Collateral, if any | Amount        |
| 8 |                |                       | (In Table II) |

9 \_\_\_\_\_  
10 \_\_\_\_\_  
11 \_\_\_\_\_  
12 \_\_\_\_\_  
13 \_\_\_\_\_

14 19. List below all liabilities of the reporting individual and such  
15 individual's spouse or domestic partner, in EXCESS of \$10,000 as of  
16 the date of filing of this statement, other than liabilities to a  
17 relative. Do NOT list liabilities incurred by, or guarantees made  
18 by, the reporting individual or such individual's spouse or domestic  
19 partner or by any proprietorship, partnership or corporation in  
20 which the reporting individual or such individual's spouse or domes-  
21 tic partner has an interest, when incurred or made in the ordinary  
22 course of the trade, business or professional practice of the  
23 reporting individual or such individual's spouse or domestic part-  
24 ner. Include the name of the creditor and any collateral pledged by  
25 such individual to secure payment of any such liability. A reporting  
26 individual shall not list any obligation to pay maintenance in  
27 connection with a matrimonial action, alimony or child support  
28 payments. Any loan issued in the ordinary course of business by a  
29 financial institution to finance educational costs, the cost of home  
30 purchase or improvements for a primary or secondary residence, or  
31 purchase of a personally owned motor vehicle, household furniture or  
32 appliances shall be excluded. If any such reportable liability has  
33 been guaranteed by any third person, list the liability and name the  
34 guarantor.

|    |                  |                        |               |
|----|------------------|------------------------|---------------|
| 35 |                  |                        | Category      |
| 36 | Name of Creditor | Type of Liability      | of            |
| 37 | or Guarantor     | and Collateral, if any | Amount        |
| 38 |                  |                        | (In Table II) |

39 \_\_\_\_\_  
40 \_\_\_\_\_  
41 \_\_\_\_\_  
42 \_\_\_\_\_  
43 \_\_\_\_\_

44 The requirements of law relating to the reporting of financial  
45 interests are in the public interest and no adverse inference of  
46 unethical or illegal conduct or behavior will be drawn merely from  
47 compliance with these requirements.

|    |                                     |                       |
|----|-------------------------------------|-----------------------|
| 48 | _____                               | _____                 |
| 49 | (Signature of Reporting Individual) | Date (month/day/year) |

TABLE I

|    |              |             |                  |             |
|----|--------------|-------------|------------------|-------------|
| 1  |              |             |                  |             |
| 2  | Category A   |             | none             |             |
| 3  | Category B   | \$          | 1 to under       | \$ 1,000    |
| 4  | Category C   | \$          | 1,000 to under   | \$ 5,000    |
| 5  | Category D   | \$          | 5,000 to under   | \$ 20,000   |
| 6  | Category E   | \$          | 20,000 to under  | \$ 50,000   |
| 7  | Category F   | \$          | 50,000 to under  | \$ 75,000   |
| 8  | Category G   | \$          | 75,000 to under  | \$ 100,000  |
| 9  | Category H   | \$          | 100,000 to under | \$ 150,000  |
| 10 | Category I   | \$          | 150,000 to under | \$ 250,000  |
| 11 | Category J   | \$          | 250,000 to under | \$ 350,000  |
| 12 | Category K   | \$          | 350,000 to under | \$ 450,000  |
| 13 | Category L   | \$          | 450,000 to under | \$ 550,000  |
| 14 | Category M   | \$          | 550,000 to under | \$ 650,000  |
| 15 | Category N   | \$          | 650,000 to under | \$ 750,000  |
| 16 | Category O   | \$          | 750,000 to under | \$ 850,000  |
| 17 | Category P   | \$          | 850,000 to under | \$ 950,000  |
| 18 | Category Q   | \$          | 950,000 to under | \$1,050,000 |
| 19 | Category R   | \$1,050,000 | to under         | \$1,150,000 |
| 20 | Category S   | \$1,150,000 | to under         | \$1,250,000 |
| 21 | Category T   | \$1,250,000 | to under         | \$1,350,000 |
| 22 | Category U   | \$1,350,000 | to under         | \$1,450,000 |
| 23 | Category V   | \$1,450,000 | to under         | \$1,550,000 |
| 24 | Category W   | \$1,550,000 | to under         | \$1,650,000 |
| 25 | Category X   | \$1,650,000 | to under         | \$1,750,000 |
| 26 | Category Y   | \$1,750,000 | to under         | \$1,850,000 |
| 27 | Category Z   | \$1,850,000 | to under         | \$1,950,000 |
| 28 | Category AA  | \$1,950,000 | to under         | \$2,050,000 |
| 29 | Category BB  | \$2,050,000 | to under         | \$2,150,000 |
| 30 | Category CC  | \$2,150,000 | to under         | \$2,250,000 |
| 31 | Category DD  | \$2,250,000 | to under         | \$2,350,000 |
| 32 | Category EE  | \$2,350,000 | to under         | \$2,450,000 |
| 33 | Category FF  | \$2,450,000 | to under         | \$2,550,000 |
| 34 | Category GG  | \$2,550,000 | to under         | \$2,650,000 |
| 35 | Category HH  | \$2,650,000 | to under         | \$2,750,000 |
| 36 | Category II  | \$2,750,000 | to under         | \$2,850,000 |
| 37 | Category JJ  | \$2,850,000 | to under         | \$2,950,000 |
| 38 | Category KK  | \$2,950,000 | to under         | \$3,050,000 |
| 39 | Category LL  | \$3,050,000 | to under         | \$3,150,000 |
| 40 | Category MM  | \$3,150,000 | to under         | \$3,250,000 |
| 41 | Category NN  | \$3,250,000 | to under         | \$3,350,000 |
| 42 | Category OO  | \$3,350,000 | to under         | \$3,450,000 |
| 43 | Category PP  | \$3,450,000 | to under         | \$3,550,000 |
| 44 | Category QQ  | \$3,550,000 | to under         | \$3,650,000 |
| 45 | Category RR  | \$3,650,000 | to under         | \$3,750,000 |
| 46 | Category SS  | \$3,750,000 | to under         | \$3,850,000 |
| 47 | Category TT  | \$3,850,000 | to under         | \$3,950,000 |
| 48 | Category UU  | \$3,950,000 | to under         | \$4,050,000 |
| 49 | Category VV  | \$4,050,000 | to under         | \$4,150,000 |
| 50 | Category WW  | \$4,150,000 | to under         | \$4,250,000 |
| 51 | Category XX  | \$4,250,000 | to under         | \$4,350,000 |
| 52 | Category YY  | \$4,350,000 | to under         | \$4,450,000 |
| 53 | Category ZZ  | \$4,450,000 | to under         | \$4,550,000 |
| 54 | Category AAA | \$4,550,000 | to under         | \$4,650,000 |
| 55 | Category BBB | \$4,650,000 | to under         | \$4,750,000 |
| 56 | Category CCC | \$4,750,000 | to under         | \$4,850,000 |

|    |                |              |          |              |
|----|----------------|--------------|----------|--------------|
| 1  | Category DDD   | \$4,850,000  | to under | \$4,950,000  |
| 2  | Category EEE   | \$4,950,000  | to under | \$5,050,000  |
| 3  | Category FFF   | \$5,050,000  | to under | \$5,150,000  |
| 4  | Category GGG   | \$5,150,000  | to under | \$5,250,000  |
| 5  | Category HHH   | \$5,250,000  | to under | \$5,350,000  |
| 6  | Category III   | \$5,350,000  | to under | \$5,450,000  |
| 7  | Category JJJ   | \$5,450,000  | to under | \$5,550,000  |
| 8  | Category KKK   | \$5,550,000  | to under | \$5,650,000  |
| 9  | Category LLL   | \$5,650,000  | to under | \$5,750,000  |
| 10 | Category MMM   | \$5,750,000  | to under | \$5,850,000  |
| 11 | Category NNN   | \$5,850,000  | to under | \$5,950,000  |
| 12 | Category OOO   | \$5,950,000  | to under | \$6,050,000  |
| 13 | Category PPP   | \$6,050,000  | to under | \$6,150,000  |
| 14 | Category QQQ   | \$6,150,000  | to under | \$6,250,000  |
| 15 | Category RRR   | \$6,250,000  | to under | \$6,350,000  |
| 16 | Category SSS   | \$6,350,000  | to under | \$6,450,000  |
| 17 | Category TTT   | \$6,450,000  | to under | \$6,550,000  |
| 18 | Category UUU   | \$6,550,000  | to under | \$6,650,000  |
| 19 | Category VVV   | \$6,650,000  | to under | \$6,750,000  |
| 20 | Category WWW   | \$6,750,000  | to under | \$6,850,000  |
| 21 | Category XXX   | \$6,850,000  | to under | \$6,950,000  |
| 22 | Category YYY   | \$6,950,000  | to under | \$7,050,000  |
| 23 | Category ZZZ   | \$7,050,000  | to under | \$7,150,000  |
| 24 | Category AAAA  | \$7,150,000  | to under | \$7,250,000  |
| 25 | Category BBBB  | \$7,250,000  | to under | \$7,350,000  |
| 26 | Category CCCC  | \$7,350,000  | to under | \$7,450,000  |
| 27 | Category DDDD  | \$7,450,000  | to under | \$7,550,000  |
| 28 | Category EEEE  | \$7,550,000  | to under | \$7,650,000  |
| 29 | Category FFFF  | \$7,650,000  | to under | \$7,750,000  |
| 30 | Category GGGG  | \$7,750,000  | to under | \$7,850,000  |
| 31 | Category HHHH  | \$7,850,000  | to under | \$7,950,000  |
| 32 | Category IIII  | \$7,950,000  | to under | \$8,050,000  |
| 33 | Category JJJJ  | \$8,050,000  | to under | \$8,150,000  |
| 34 | Category KKKK  | \$8,150,000  | to under | \$8,250,000  |
| 35 | Category LLLL  | \$8,250,000  | to under | \$8,350,000  |
| 36 | Category MMMM  | \$8,350,000  | to under | \$8,450,000  |
| 37 | Category NNNN  | \$8,450,000  | to under | \$8,550,000  |
| 38 | Category OOOO  | \$8,550,000  | to under | \$8,650,000  |
| 39 | Category PPPP  | \$8,650,000  | to under | \$8,750,000  |
| 40 | Category QQQQ  | \$8,750,000  | to under | \$8,850,000  |
| 41 | Category RRRR  | \$8,850,000  | to under | \$8,950,000  |
| 42 | Category SSSS  | \$8,950,000  | to under | \$9,050,000  |
| 43 | Category TTTT  | \$9,050,000  | to under | \$9,150,000  |
| 44 | Category UUUU  | \$9,150,000  | to under | \$9,250,000  |
| 45 | Category VVVV  | \$9,250,000  | to under | \$9,350,000  |
| 46 | Category WWWW  | \$9,350,000  | to under | \$9,450,000  |
| 47 | Category XXXX  | \$9,450,000  | to under | \$9,550,000  |
| 48 | Category YYYY  | \$9,550,000  | to under | \$9,650,000  |
| 49 | Category ZZZZ  | \$9,650,000  | to under | \$9,750,000  |
| 50 | Category AAAAA | \$9,750,000  | to under | \$9,850,000  |
| 51 | Category BBBBB | \$9,850,000  | to under | \$9,950,000  |
| 52 | Category CCCCC | \$9,950,000  | to under | \$10,000,000 |
| 53 | Category DDDDD | \$10,000,000 | or over  |              |

|    |             |             |                  |             |
|----|-------------|-------------|------------------|-------------|
| 1  | Category A  |             | none             |             |
| 2  | Category B  | \$          | 1 to under       | \$ 1,000    |
| 3  | Category C  | \$          | 1,000 to under   | \$ 5,000    |
| 4  | Category D  | \$          | 5,000 to under   | \$ 20,000   |
| 5  | Category E  | \$          | 20,000 to under  | \$ 50,000   |
| 6  | Category F  | \$          | 50,000 to under  | \$ 75,000   |
| 7  | Category G  | \$          | 75,000 to under  | \$ 100,000  |
| 8  | Category H  | \$          | 100,000 to under | \$ 150,000  |
| 9  | Category I  | \$          | 150,000 to under | \$ 250,000  |
| 10 | Category J  | \$          | 250,000 to under | \$ 500,000  |
| 11 | Category K  | \$          | 500,000 to under | \$ 750,000  |
| 12 | Category L  | \$          | 750,000 to under | \$1,000,000 |
| 13 | Category M  | \$1,000,000 | to under         | \$1,250,000 |
| 14 | Category N  | \$1,250,000 | to under         | \$1,500,000 |
| 15 | Category O  | \$1,500,000 | to under         | \$1,750,000 |
| 16 | Category P  | \$1,750,000 | to under         | \$2,000,000 |
| 17 | Category Q  | \$2,000,000 | to under         | \$2,250,000 |
| 18 | Category R  | \$2,250,000 | to under         | \$2,500,000 |
| 19 | Category S  | \$2,500,000 | to under         | \$2,750,000 |
| 20 | Category T  | \$2,750,000 | to under         | \$3,000,000 |
| 21 | Category U  | \$3,000,000 | to under         | \$3,250,000 |
| 22 | Category V  | \$3,250,000 | to under         | \$3,500,000 |
| 23 | Category W  | \$3,500,000 | to under         | \$3,750,000 |
| 24 | Category X  | \$3,750,000 | to under         | \$4,000,000 |
| 25 | Category Y  | \$4,000,000 | to under         | \$4,250,000 |
| 26 | Category Z  | \$4,250,000 | to under         | \$4,500,000 |
| 27 | Category AA | \$4,500,000 | to under         | \$4,750,000 |
| 28 | Category BB | \$4,750,000 | to under         | \$5,000,000 |
| 29 | Category CC | \$5,000,000 | to under         | \$5,250,000 |
| 30 | Category DD | \$5,250,000 | to under         | \$5,500,000 |
| 31 | Category EE | \$5,500,000 | to under         | \$5,750,000 |
| 32 | Category FF | \$5,750,000 | to under         | \$6,000,000 |
| 33 | Category GG | \$6,000,000 | to under         | \$6,250,000 |
| 34 | Category HH | \$6,250,000 | to under         | \$6,500,000 |
| 35 | Category II | \$6,500,000 | to under         | \$6,750,000 |
| 36 | Category JJ | \$6,750,000 | to under         | \$7,000,000 |
| 37 | Category KK | \$7,000,000 | to under         | \$7,250,000 |
| 38 | Category LL | \$7,250,000 | to under         | \$7,500,000 |
| 39 | Category MM | \$7,500,000 | to under         | \$7,750,000 |
| 40 | Category NN | \$7,750,000 | to under         | \$8,000,000 |
| 41 | Category OO | \$8,000,000 | to under         | \$8,250,000 |
| 42 | Category PP | \$8,250,000 | to under         | \$8,500,000 |
| 43 | Category QQ | \$8,500,000 | to under         | \$8,750,000 |
| 44 | Category RR | \$8,750,000 | to under         | \$9,000,000 |
| 45 | Category SS | \$9,000,000 | to under         | \$9,250,000 |
| 46 | Category TT | \$9,250,000 | to under         | \$9,500,000 |
| 47 | Category UU | \$9,500,000 | or over          |             |

48 (b) The legislative ethics commission shall make available a searcha-  
49 ble version of the annual statement of financial disclosure by January  
50 first, two thousand twenty-six to all those required by law to submit  
51 such forms and thereafter on an annual basis on January first.

52 § 4. This act shall take effect immediately; provided, however, that  
53 section two of this act shall take effect January 1, 2026. Effective  
54 immediately the addition, amendment and/or repeal of any rule or regu-  
55 lation necessary for the implementation of this act on its effective  
56 date are authorized to be made and completed on or before such date.