

*This electronic disclosure form is most easily used with Microsoft operating systems and a personal computer.*

**If you are using Explorer:**

<http://www.ethicscommissioner.ab.ca/disclosure/designated-office-holders/> Click on 2017 Designated Office Holders

Go to Tools; click file; save as  
Save it to your desktop as 2017 Disclosure “last Name” (ie: 2017disclosureJones)

Open it again, and fill it in. Save it to your desktop again.

Open an email and attach the completed form to: [disclosure@ethicscommissioner.ab.ca](mailto:disclosure@ethicscommissioner.ab.ca)

**If you are using Firefox:**

<http://www.ethicscommissioner.ab.ca/disclosure/designated-office-holders/>  
Click on 2017 Designated Office Holders

At the top right hand corner of the page you will see “Open with Different Viewer”. Click on this.

Go to your “downloads” and open up the PDF document.

Fill it in and save it to your desktop as 2017 Disclosure “last Name”

Open an email and attach form to: [disclosure@ethicscommissioner.ab.ca](mailto:disclosure@ethicscommissioner.ab.ca)

**If you are using Chrome:**

<http://www.ethicscommissioner.ab.ca/disclosure/designated-office-holders/> Click on 2017 Designated Office Holders

Move your cursor to the bottom right of the page until you see the tool bar, click on the save icon and save to your desktop. Close your browser and open the document – it should be a PDF document. Fill in the form and save as 2017 Disclosure “last Name”.

Open an email and attach form to: [disclosure@ethicscommissioner.ab.ca](mailto:disclosure@ethicscommissioner.ab.ca)

**If you choose to use iPad: (not recommended)**

<http://www.ethicscommissioner.ab.ca/disclosure/designated-office-holders/>  
Click on 2017 Designated Office Holders

Fill in the form. When you are done, click file; share with email and send to [disclosure@ethicscommissioner.ab.ca](mailto:disclosure@ethicscommissioner.ab.ca). A copy of the form will be saved in your documents on your iPad.

*If you have any questions, or difficulties in working with this document, please contact our office at 780-422-2273 or simply print the form, fill it out manually and then submit to our office along with your detailed financial information.*



**DESIGNATED OFFICE HOLDER  
ANNUAL ETHICS DISCLOSURE STATEMENT**

IMPORTANT NOTE: This is a point-in-time collection of information. We expect accurate and updated information.

**Complete this form based on your financial affairs for as of:**

**March 31, 2017**

Please save this completed form to your desktop and submit via email to the  
Office of the Ethics Commissioner [disclosure@ethicscommissioner.ab.ca](mailto:disclosure@ethicscommissioner.ab.ca)

Member Name	
Ministry/Section	
Preferred Email Address for Future Contact	

**DECLARATION:**

I am familiar with the requirements of the Conflicts of Interest Act (the Act), Chapter C-23, Revised Statutes of Alberta 2000, and all subsequent amendments and have sought advice and information from the Office of the Ethics Commissioner of Alberta where needed to inform myself of my obligations and the information required to be disclosed.

This private disclosure statement accurately discloses, to the best of my knowledge, all assets, liabilities, financial interests, and income of myself, my spouse, my minor children, and private corporations controlled by any of us, or a combination of us, as required by the aforementioned Acts.

I hereby certify that there are no conflicts of interest between my official responsibilities and public duties and the matters contained in this private disclosure statement concerning myself and, as far as is known to me, my spouse, minor children, and private corporations controlled by any of us.

Financial Statements Included

I Agree

\_\_\_\_\_  
Ethics Commissioner

\_\_\_\_\_  
Designated Office Holder's Signature

\_\_\_\_\_  
Date of Meeting with Designated Office Holder

\_\_\_\_\_  
Date of Submission of Disclosure Forms

**IMPORTANT:** *There are four sections in this form. Everyone must Complete Section 1.*


*Complete Sections 2, 3, and/or 4 ONLY if they are relevant to you.*


1. Member Section 1 (***ALL must complete***)
2. Spouse or Adult Interdependent Partner Section 2 (*complete ONLY if married or in an interdependent relationship*)
3. Minor Children Section 3 (*complete ONLY if you have children who are under 18 years of age as of January 1 of this disclosure period*)
4. Private Corporations Section 4 (*complete one "private corporation" disclosure form for each company in which you or your spouse are a Director, or where any combination of you, your spouse and your children jointly hold more than 20% of the shares of a company*).

If you have any questions, please feel free to contact us at 780-422-2273 or [disclosure@ethicscommissioner.ab.ca](mailto:disclosure@ethicscommissioner.ab.ca)

## Section 1 DESIGNATED OFFICE HOLDER

### PERSONAL INFORMATION

<b>Spouse/Adult Interdependent Partner</b> 	<b>Or if N/A, check here</b>

<b>Given Names of Children under 18</b> 	<b>Birthdate</b> <b>DD/MO/Year</b>

Home Address:

<b>Street Address, City and Postal Code</b>	<b>Work Phone</b>	<b>Cell Phone</b>	<b>Home Phone</b>


<b>Current Employment Info</b> (including any previous positions in the current disclosure period)		
<b>Name of Company/Organization</b>	<b>Position/Title</b>	<b>Salary</b>

**CORPORATE INFORMATION**

<b>Private Corporations</b>	
<b>Name of Corporation/Organization</b>	<b>Director/Officer/Percentage Ownership</b>

<b>Non-Profit Directorships and Offices (Example: non-profits, community leagues, etc.)</b>	
<b>Name of Company/Organization</b>	<b>Position Title</b>

**OTHER INCOME**

<b>If you have received income from any source in the last year other than previously noted, please provide details below. </b>	
	<b>Gross Amount</b>
<b>Rental Income</b>	
<b>Disability or pension income</b>	
<b>Trust fund income</b>	
<b>Other income from Private Corporations</b>	
<b>Other income (specify source)</b>	
<b>Other income (specify source)</b>	
<b>Other income (specify source)</b>	

**ASSETS (include all foreign assets/holdings)**

<b>Real Property (Foreign bank properties use municipal assessment value; for farmland, use market value).</b>				
<b>Type</b>	<b>Location (street address or plan, block, lot and city/town)</b>	<b>Assessed Value (per municipal assessment notice)</b>	<b>Outstanding mortgage balance</b>	<b>Who is your mortgage with (name of bank or institution)</b>
Primary Residence				
Secondary Residence				
Recreational Property				
Rental Properties				
Rental Properties				
Rental Properties				
Other Properties				
Other Properties				

<b>Bank Accounts and other Deposits</b>		
<b>Type</b>	<b>Institution</b>	<b>Balance</b>
Chequing		
Savings		
Foreign Holdings (if applicable)		
Other Deposits or Accounts		
Other Deposits or Accounts		
Other Deposits or Accounts		
Other Deposits or Accounts		

<b>Pension Rights</b>		
<b>Plan</b>	<b>Administrator</b>	<b>Years of Service</b>

<b>Life Insurance Policies</b>	
<b>Insurer and type (whole or term)</b>	<b>Cash Surrender Value or Insured Value</b>

<b>Annuities</b>	
<b>Person Paying Annuity</b>	<b>Value</b>

<b>Household and Personal Property (estimated replacement value, or appraised value if applicable)</b>	
	<b>Estimated Total Value</b>
<b>Art</b>	
<b>Jewelry</b>	
<b>Antiques and collectables</b>	
<b>Musical instruments and equipment</b>	
<b>Household contents</b>	
<b>Tools</b>	

Car/Truck/Boat and Recreational Vehicles (include make and model), , bicycles, and motorbikes.	Black Book Value <a href="http://www.canadianblackbook.com/">http://www.canadianblackbook.com/</a>
Year/Make/Model	Value
Vehicle 1:	
Vehicle 2:	
Vehicle 3:	
Recreational Vehicle:	
Other Vehicles:	
Other Vehicles:	

**INVESTMENTS**

**IMPORTANT NOTE: Please attach actual, detailed investment statements showing all specific investments and holdings as of the disclosure date, or as close as possible, and as provided by your financial advisor and/or broker including, but not limited to the following:**

**1 RRSP/RSP/LIRA**

**2 Stocks, Corporate Bonds and Other Interests in Publicly Traded Securities**

**3 TFSA**

**4 RESP**


**5 GICs/Canada Savings Bonds/Term Deposits, and Government (federal, provincial, or municipal) Backed Securities**

<b>Other Investments and Significant Assets – Not captured above</b>	
	<b>Value</b>

**Attach Statements**



**LIABILITIES (include all foreign liabilities/debts)**

**Unpaid Municipal or Federal Taxes** 

Type of unpaid tax (i.e.: income, property)	Creditor/Agency (ie: Municipality of X or Revenue Canada)	Amount Owing	Arrears pertaining to what years

**Other Loans and Lines of Credit** 

Creditor	Amount Owing

**Guarantees** 

Creditor	Principal Debtor	Amount Guaranteed

**Support Obligations** 

Relationship to Recipient	Amount of Monthly Obligation

<b>Other Significant Liabilities</b>		
<b>Description of Liability</b>	<b>To Whom Owed</b>	<b>Amount Owing</b>

<b>Legal Proceedings</b>

<b>OTHER PERSONAL OR FINANCIAL INTERESTS NOT ALREADY DISCLOSED</b>	
<b>Description of Interest</b>	<b>Value</b>

<b>NON-COMMERCIAL AIR TRAVEL – Please list all Non-Commercial Air Travel - Include air travel previously reported and any travel not yet reported.</b>

<b>OTHER PERTINENT DISCLOSURES</b>
<b>Provide details below:</b>

<b>Have you or your spouse received any inheritances of any kind in the last year? If so, please provide details.</b>

## Section 2

### Spouse or Adult Interdependent Partner (if applicable)

Important Note: Please attach actual, detailed investment statements (RRSP&Spousal/RSP/LIRA/Securities/TFSA/GICs/Bonds, etc.) showing all specific investments and holdings as at the disclosure dates and as provided by your financial advisor and/or broker.

<b>Spouse/Partner Full Name</b>	
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<b>INCOME:</b>	
Source of Income (Company and Position)	Annual Amount

<b>ASSETS (include all foreign holdings) – if joint with spouse, please enter “joint with spouse”</b>			
Real Property Address:	Value	Mortgage Co.	Mortgage \$

Bank Accounts	Type	Amount

Vehicles	Make/Model	Value
	<b>Comments: (Value//Income/Years of Service)</b>	
<b>Pension Rights</b>		
<b>Insurance Policies</b>		
<b>Annuities</b>		
<b>Private Business Interests</b>		
<b>Household and personal property (if separate from Designated Office Holder)</b>		
<b>Investments</b>	<b>Attach Statements</b>	


<b>LIABILITIES: If joint with spouse, please enter "joint with spouse"</b>	
<b>Unpaid Municipal Realty Taxes</b>	
<b>Loans or Lines of Credit</b>	
<b>Guarantees</b>	
<b>Unpaid Income Tax</b>	
<b>Support Obligations</b>	
<b>Other Significant Liabilities</b>	


<b>OTHER FINANCIAL INTERESTS – if joint with spouse, please enter "joint with spouse"</b>

## Section 3

### Minor Children (under the age of 18)

Please attach actual, detailed investment statements (RRSP/RSP/RESP/LIRA/Securities/TFSA/GICs/Stocks/Bonds, etc.) showing all specific investments and holds as at the disclosure date and as provided by your financial advisor and/or broker.

If you have minor child/children under 18 years of age as at March 30, of the reporting period, please provide details below.	
Minor Child/Children Given Names 	Surname if Different

INCOME: 	
Source of Income	Annual Amount

ASSETS: - include foreign holdings if applicable	
Bank Accounts	
Bonds and Government Securities	
Life Insurance	
Annuities/Trust Fund	
RESP	
Other Significant Assets	

<b>LIABILITIES:</b>	
<b>Loans</b>	
<b>Unpaid Income Tax</b>	
<b>Other Significant Liabilities</b>	

<b>OTHER SIGNIFICANT INTERESTS</b>

## Section 4 Private Corporations

**Note:** Please complete one 'Private Corporation' disclosure form for **each company in which you or your spouse are a Director**, or where any combination of you, your spouse and your children jointly hold **more than 20%** of the shares of a company.

NAME OF CORPORATION

GROSS ANNUAL CORPORATE INCOME:
Amount:

ASSETS:			
Real Property: Address	Value	Mortgage Co.	Mortgage \$
<b>Cash and Equivalencies</b>			
<b>Bonds and Government Securities</b>			
<b>GICs, Term Deposits, etc.</b>			
<b>Stocks/Securities/Interests in Public Corporations</b>			
<b>Annuities</b>			
<b>Other Business Interests</b>			
<b>Furnishings/Equipment/Corporate Property</b>			

<b>LIABILIBITES</b>	
<b>Legal Proceedings</b>	
<b>Unpaid Municipal Taxes</b>	
<b>Loans and Lines of Credit</b>	
<b>Unpaid Income Tax</b>	
<b>Other Significant Liabilities</b>	

<b>OTHER FINANCIAL INTERESTS:</b>