

Notice to ALL CANDIDATES

INSTRUCTIONS – PLEASE READ

This report covers Calendar Year 2025 for the November 3, 2026, Election.

This Candidate Tier 2 Personal Financial Disclosure (Form 416B) covers your 2025 personal finances and must be electronically filed through the PFD E-File system by August 12, 2026.

This disclosure is separate from your campaign finance reports and is required regardless of your campaign finance contributions or expenditures.

Electronically filing via the PFD E-File system is the only acceptable method for submitting this Candidate Tier 2 Personal Financial Disclosure. The attached copy is for information purposes only.

Any other method, such as email, upload, fax, mail, or hand delivery, WILL NOT BE ACCEPTED. PFD E-File requires a LEADERS login and password issued by the IT Department.

Failure to file this Candidate Tier 2 Personal Financial Disclosure Statement will result in a late fee.

Each year after being elected, you are required to file an Annual Personal Financial Disclosure by May 15th.

STEP 1:

Complete the enclosed Electronic Filing Affidavit or visit our website.

Skip to STEP 4 if you already have a LEADERS User ID and password.

- Go to [Ethics.La.gov](https://ethics.la.gov)
- Select the [Disclosure] tab
- Click **Disclosure Forms** & scroll to the bottom of the page
- Select the **Disclosures Electronic Filing Affidavit**

STEP 2:

The affidavit must be completed, notarized, and submitted to our office by either:

- **Upload:** <https://eap.ethics.la.gov/FileUpload/> & select Electronic Filing Affidavit from the drop-down menu
- **Fax:** (225) 381-7271
- **Hand Delivery:** 617 N. Third Street, 10th Floor, Baton Rouge, LA 70802

STEP 3:

Once our office receives your notarized affidavit, the IT Department will call you or call your preparer to set up your LEADERS account.

STEP 4:

Access your LEADERS account by using this link: <https://eap.ethics.la.gov/PFDOnline/Account/LogOn> and select **Form 416B – Candidate Tier 2, which is due by 8/12/2026**.

If you are having issues logging in, contact the IT Department at (225) 219-5600.

*If you filed a complete 2025 Tier 2 Annual Personal Financial Disclosure (Form 416A) between January 1, 2026, and August 4, 2026, you are not required to file this 2025 Candidate Personal Financial Disclosure.

NOTICE TO ALL CANDIDATES

The LAW requires you to file your Tier 2 Personal Financial Disclosure electronically via the LEADERS E-File portal within 3 business days after qualifying.

You CANNOT submit this report by email, upload, fax, mail, or hand delivery.

If you are a first-time electronic filer, you must file the electronic filing affidavit with our agency as soon as possible.

The electronic filing affidavit has been included in this packet. It can also be downloaded from our website.

Go to www.ethics.la.gov

- Select the [**Disclosure**] tab
- Click **Disclosure Forms** & scroll to the bottom of the page
- Select the **Disclosures Electronic Filing Affidavit**

STATE OF _____

PARISH OF _____

For Office Use Only: EFA

Affidavit Received: _____

Assigned Filer ID: _____

Date Organized: _____

ELECTRONIC FILING AFFIDAVIT

BEFORE ME, undersigned Notary Public, duly commissioned and qualified in and for the State and Parish aforesaid, therein residing, personally came and appeared:

Affiant's Name (Typed or Printed)

Affiant's Telephone Number

Affiant's Address (as should be listed on electronically filed reports)

Email Address for Notices: _____

This email address will be used by the Louisiana Board of Ethics to send reminders notices and notices of delinquency as required pursuant to R.S. 42:1160.

Who, being duly sworn, declared that :

1. Affiant is required to file ___ campaign finance reports, ___ personal financial disclosures, or ___ other reports filed pursuant to the Code of Governmental Ethics.
2. Affiant authorizes reports to be electronically filed with Louisiana Board of Ethics.
3. Use of the password issued pursuant to this affidavit to submit reports represents Affiant's certification to the accuracy of all information contained in such reports.

Affiant further declared that:

_____ Affiant will be the only individual authorized to use the Electronic Filing Password to submit reports electronically to the Louisiana Board of Ethics.

_____ Affiant authorizes the following report preparer(s) to use the Electronic Filing Password to submit reports electronically to the Louisiana Board of Ethics:

Name of Preparer (Type or Print name)

Telephone Number

E-Mail Address

Name of Preparer (Type or Print name)

Telephone Number

E-Mail Address

Affiant's Signature

SWORN TO AND SUBSCRIBED before me, this ___ day of _____, 20___.

Notary Public (sign)

Notary Public (Type or Print name)

Notary/Bar Roll Number

Please submit the completed form to the Louisiana Board of Ethics in one of the following methods:

Upload: <https://eap.ethics.la.gov/FileUpload/>

Fax: **225-381-7271**

Mail: **Louisiana Board of Ethics, P.O. Box 4368, Baton Rouge, LA 70821**

(CANDIDATE) TIER 2 PERSONAL FINANCIAL DISCLOSURE STATEMENT

Pursuant to *La. R.S. 18:1495.7*, any person who becomes a candidate for an office for which the holder of the office is required to file financial disclosure statements for the office for which he is a candidate.

GENERAL INFORMATION

- ❖ You are required to file a Tier 2 Personal Financial Disclosure Statement if you are a candidate seeking election to the *state legislature* or to an office *representing a voting district with a population over 5,000*.
- ❖ If you are the incumbent seeking **re-election** and prior to qualifying, timely filed a complete annual financial disclosure statement with the Board of Ethics (and in the same calendar year and of the same Tier Level), such filing shall satisfy the requirements of this Section.
- ❖ If you are not the incumbent but filed an annual disclosure for a different office/position and you have previously filed an annual personal financial disclosure statement timely with the Board of Ethics (in the same calendar year and of the same Tier Level), such filing shall satisfy the requirements of this Section.
- ❖ You are required to report financial information on the previous calendar year.
- ❖ You may not request an extension to file your personal financial disclosure statement.
- ❖ If additional copies of the schedules are needed, copies are available at www.ethics.la.gov.
- ❖ You must file your personal financial disclosure statement with the Board of Ethics **WITHIN THREE (3) BUSINESS DAYS after the close of the qualifying period during which you filed your Notice of Candidacy for the office**.

- ❖ For additional information, call our office at 225-219-5600 or visit our website, www.ethics.la.gov, and view the *Disclosure—Frequently Asked Questions* section or the information sheets provided under *General Information—Publications*.

- o **Electronic Filing (PFD E-File) is the only acceptable method for filing a Tier 2 personal financial disclosure statement. PFD E-File requires a login User ID and password issued by the Ethics IT Department.**

The financial statement shall be filed electronically with the Board of Ethics through the Board of Ethics Computerized Data Management System and shall be accompanied by the certification of the individual filing it certifying that the information contained in the financial statement is true and correct to the best of his knowledge, information, and belief.

Go to www.ethics.la.gov > Disclosure & select PFD E-File (requires login)

Instructions

Cover Sheet

- You are required to disclose financial information related to the **previous calendar year**.
- You are required to disclose information related to you and your spouse (if applicable).
- You are required to disclose whether you have filed your federal and state income tax returns for the previous year or requested an extension in filing your returns. If you are a candidate in an election to be held prior to April 15th and you have not filed your taxes for the prior year, you need to check the appropriate box.
- You are required to sign the cover sheet certifying that the information contained is true and correct to the best of your knowledge, information, and belief.

Schedule A: Employment Information

- You are required to disclose employment information related to both you and your spouse (if applicable).
- List the name of the employer; the title of the position; a brief description of the job; and disclosure as to whether the position is full-time or part-time.

Schedule B: Positions – Business

- You are required to complete SCHEDULE B if you or your spouse is a director, officer, stockholder, owner, partner, member, or trustee of a business **and** if you or your spouse (either individually or collectively) owns an interest in a business which exceeds 10%.
- **“Business” means** any corporation, limited liability company, partnership, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.

Schedule C: Positions – Nonprofit

- You are required to complete SCHEDULE C if you or your spouse is a director or officer of a nonprofit organization.

Schedule D: Other Offices/Positions

- You are required to complete SCHEDULE D if you hold any other office or position which would require you to file a personal financial disclosure statement under La. R.S. 42:1124.2.1, or 42:1124.3.

Schedule E: Immovable Property

- You are required to complete SCHEDULE E if you or your spouse (either individually or collectively) has an interest in immovable property (regardless of the property’s location) where the value of the interest in each parcel exceeds \$5,000.
- You are required to disclose the location by state, and parish/county.
- You are required to provide a brief description of the immovable property and the fair market value or use value (of your interest in the parcel) as determined by the assessor for purposes of ad valorem taxes.

- The value is reported by category:
 - o Category I: Less than \$10,000
 - o Category II: \$10,000 - \$49,999
 - o Category III: \$50,000 - \$100,000
 - o Category IV: More than \$100,000

Schedule F: Income from the State, Political Subdivisions, and/or Gaming Interests

- **You are required to complete SCHEDULE F** if you or your spouse received income from the State, any political subdivision, and/or a gaming interest, OR if a business in which you or your spouse owns an interest which exceeds 10% (either individually or collectively) received income from the aforementioned sources.
- Amount of income received must be reported as an exact dollar amount.
- **“Business” means** any corporation, limited liability company, partnership, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.
- **“Income” (for a business) means** gross income less costs of goods sold, and operating expenses.
- **“Income” (for an individual) means** taxable income and shall not include any income received pursuant to a life insurance policy.
- **“Political Subdivision” means** a parish, municipality, or any other unit of local government, including a school board or a special district authorized by law to perform governmental functions, e.g., hospital service districts, school boards (and schools under its authority), police juries, parish councils, boards of aldermen, cities, towns, villages, city councils, clerks of court, etc.
- **“Gaming Interest” means** [as defined in La. R.S. 18:1505.2L(3)(a)] (i) Any person who holds a license or permit as a distributor of gaming devices, who holds a license or permit as a manufacturer of gaming devices, who holds a license or permit as a device service entity, and any person who owns a truck stop or a licensed pari-mutuel or off-track wagering facility which is a licensed device establishment, all pursuant to the Video Draw Poker Devices Control Law; (ii) Any person who holds a license to conduct gaming activities on a riverboat, who holds a license or permit as a distributor or supplier of gaming devices or gaming equipment including slot machines, or who holds a license or permit as a manufacturer of gaming devices or gaming equipment including slot machines issued pursuant to the Louisiana Riverboat Economic Development and Gaming Control Act, and any person who owns a riverboat upon which gaming activities are licensed to be conducted; or (iii) Any person who holds a license or entered into a contract for the conduct of casino gaming operations, who holds a license or permit as a distributor of gaming devices or gaming equipment including slot machines, or who holds a license or permit as a manufacturer of gaming devices or gaming equipment including slot machines issued pursuant to the Louisiana Economic Development and Gaming Corporation Act, and any person who owns a casino where such gaming operations are licensed.

Schedule G: Income Received from Employment

- You are required to complete SCHEDULE G to disclose the income received by you or your spouse for each full-time or part-time employment position held.
- **“Income” (for an individual) means** taxable income and shall not include any income received pursuant to a life insurance policy.
- Income reported on SCHEDULE F does not have to be restated on SCHEDULE G, H, or I.
- **Income received through self-employment is disclosed on SCHEDULE H.**

- Income is reported by category:
 - o Category I: Less than \$10,000
 - o Category II: \$10,000 - \$49,999
 - o Category III: \$50,000 - \$100,000
 - o Category IV: more than \$100,000

Schedule H: Income from Business

- You are required to complete SCHEDULE H if you or your spouse received income from a *business*.
- **“Income” (for an individual) means** taxable income and shall not include any income received pursuant to a life insurance policy.
- **“Business” means** any corporation, limited liability company, partnership, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.
- **Income received through self-employment is disclosed on SCHEDULE H.**
- You are required to include a brief description of the nature of services rendered to each business or the reason such income was received.
- Income reported on SCHEDULE F or G does not have to be restated on SCHEDULE H or I.
- The aggregate amount of such income is reported by category:
 - o Category I: Less than \$10,000
 - o Category II: \$10,000 - \$49,999
 - o Category III: \$50,000 - \$100,000
 - o Category IV: More than \$100,000

Schedule I: Other Income

- You are required to complete SCHEDULE I if you or your spouse received any other type of income that exceeded \$1,000 from any one source.
- **“Income” (for an individual) means** taxable income and shall not include any income received pursuant to a life insurance policy.
- Income reported on SCHEDULE F, G, or H does not have to be restated on SCHEDULE I.
- You are not required to report income derived from child support and alimony payments contained in a court order, or from disability payments from any source.
- You are required to provide a brief description of the nature of the services rendered, or the reason such income was received.
- Income received is reported by category:
 - o Category I: Less than \$10,000
 - o Category II: \$10,000 - \$49,999
 - o Category III: \$50,000 - \$100,000
 - o Category IV: More than \$100,000

Schedule J: Investment Holdings

- You are required to complete SCHEDULE J if you or your spouse holds investment securities where each investment security has a value exceeding \$5,000.
- You are not required to disclose funds in variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, and cash/cash equivalent investments.
- You are not required to disclose information concerning any property held and administered for any person other than you or your spouse under a trust, tutorship, curatorship, or other custodial instrument.

Schedule K: Transactions

- You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).
- You are not required to report the purchase or sale of variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.
- The transaction amount is reported by category:
 - o Category I: Less than \$10,000
 - o Category II: \$10,000 - \$49,999
 - o Category III: \$50,000 - \$100,000
 - o Category IV: More than \$100,000

Schedule L: Liabilities

- You are required to complete SCHEDULE L if you or your spouse (either individually or collectively) owes any liability which exceeds \$10,000 on the last day of the reporting period.
- You are not required to disclose any loan secured by movable property, if such loan does not exceed the purchase price of the movable property which secures the loan.
- You are not required to disclose any liability, secured or unsecured, which is guaranteed by you or your spouse for a business in which you or your spouse owns any interest, provided that the liability is in the name of the business and, if the liability is a loan, that you or your spouse does not use proceeds from the loan for personal use unrelated to business.
- You are not required to disclose any loan by a licensed financial institution which loans money in the ordinary course of business.
- You are not required to disclose any liability resulting from a consumer credit transaction as defined in R.S. 9:3516(13).
- You are not required to disclose any loan from an immediate family member, unless such family member is a registered lobbyist, or his principal or employer is a registered lobbyist, or he employs or is a principal of a registered lobbyist, or unless such family member has a contract with the State.
- **“Consumer Credit Transaction” in R.S. 9:3516(13) means** a consumer loan or a consumer credit sale but does not include a motor vehicle credit transaction made pursuant to R.S. 6:969.1 et seq.

LOUISIANA BOARD OF ETHICS

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<https://eap.ethics.la.gov/PFDOnline>

(CANDIDATE) TIER 2 PERSONAL FINANCIAL DISCLOSURE STATEMENT

This Report Covers Calendar Year: _____

☐ ORIGINAL REPORT

☐ AMENDED REPORT

☐ I currently hold an office that would require me to file a Tier 2.1, or Tier 3 Personal Financial Disclosure Statement. As such, I have completed SCHEDULE D.

Office Sought: _____

Incumbent: ☐ Yes ☐ No

Date of Election: _____

Name of Filer (print full name): _____

Mailing Address: _____

City, State, Zip: _____

Name of Spouse (if applicable) (print full name): _____

Spouse's Occupation: _____

Spouse's Principal Business Address: _____

City, State Zip: _____

Check all that apply:

☐ I have filed my state income tax return for the year listed above.

☐ I have filed for an extension of my state income tax return for the year listed above.

☐ I have filed my federal income tax return for the year listed above.

☐ I have filed for an extension of my federal income tax return for the year listed above.

NOTE: La. R.S. 18:1495.7 and 42:1124.2 does not provide candidates the opportunity to request an extension in filing their personal financial disclosure statements.

☐ I am a candidate in an election to be held prior to April 15 and I have not filed my tax return for the year listed above.

Certificate of Accuracy

I do hereby certify that the information contained in this personal financial disclosure statement is true and correct to the best of my knowledge, information, and belief.

*This disclosure can only be accepted via electronic
filing: <https://eap.ethics.la.gov/PFDOnline>*

Paper versions NOT accepted

Signature of Filer

LOUISIANA BOARD OF ETHICS

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<https://eap.ethics.la.gov/PFDOnline>

Schedule A: Employment Information

☐ Check if not applicable

☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time Name of Employer: _____ Job Title: _____ Job Description: _____ _____
☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time Name of Employer: _____ Job Title: _____ Job Description: _____ _____
☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time Name of Employer: _____ Job Title: _____ Job Description: _____ _____
☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time Name of Employer: _____ Job Title: _____ Job Description: _____ _____

- You are required to disclose employment information related to both you and your spouse (if applicable).
- List the name of the employer; the title of the position; a brief description of the job; and disclosure as to whether the position is full-time or part-time.
- Self-employment information is reported on Schedule B.

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SCHEDULE B: POSITIONS – BUSINESS

☐ Check if not applicable

☐ Filer ☐ Spouse ☐ Both Amount of Interest: _____ % Name of Business: _____ Address: _____ City, State, Zip: _____ Business Description: _____ Nature of Association: _____
☐ Filer ☐ Spouse ☐ Both Amount of Interest: _____ % Name of Business: _____ Address: _____ City, State, Zip: _____ Business Description: _____ Nature of Association: _____
☐ Filer ☐ Spouse ☐ Both Amount of Interest: _____ % Name of Business: _____ Address: _____ City, State, Zip: _____ Business Description: _____ Nature of Association: _____
☐ Filer ☐ Spouse ☐ Both Amount of Interest: _____ % Name of Business: _____ Address: _____ City, State, Zip: _____ Business Description: _____ Nature of Association: _____

* You are required to complete SCHEDULE B if you or your spouse is a director, officer, stockholder, owner, partner, member, or trustee of a business AND if you or your spouse (either individually or collectively) owns an interest in a business which exceeds 10%.

* "Business" means any corporation, partnership, limited liability company, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.

LOUISIANA BOARD OF ETHICS

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Schedule C: Positions – Nonprofit

☐ Check if not applicable

☐ Filer ☐ Spouse

Name of Organization: _____

Address: _____

City, State, Zip: _____

Nature of Association: _____

Description of Organization: _____

☐ Filer ☐ Spouse

Name of Organization: _____

Address: _____

City, State, Zip: _____

Nature of Association: _____

Description of Organization: _____

☐ Filer ☐ Spouse

Name of Organization: _____

Address: _____

City, State, Zip: _____

Nature of Association: _____

Description of Organization: _____

☐ Filer ☐ Spouse

Name of Organization: _____

Address: _____

City, State, Zip: _____

Nature of Association: _____

Description of Organization: _____

*** You are required to complete SCHEDULE C if you or your spouse is a director or officer of a nonprofit organization.**

LOUISIANA BOARD OF ETHICS

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Schedule D: Other Offices/Positions Held

☐ Check if not applicable

Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____

*** You are required to complete SCHEDULE D if you hold any other office or position which would require you to file a personal financial disclosure statement under La. R.S. 42:1124.2.1 or 42:1124.3.**

LOUISIANA BOARD OF ETHICS

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<https://eap.ethics.la.gov/PFDOnline>**Schedule E: Immovable Property**

(where the value of the interest in the parcel exceeds \$5,000)

☐ Check if not applicable☐ Filer ☐ Spouse ☐ Both

Location of Property:

State: _____ Parish/County: _____

Description of Property: _____

Value of the Interest in the Parcel:

☐ Category I (less than \$10,000)☐ Category II (\$10,000-\$49,999)☐ Category III (\$50,000-\$100,000)☐ Category IV (more than \$100,000)☐ Filer ☐ Spouse ☐ Both

Location of Property:

State: _____ Parish/County: _____

Description of Property: _____

Value of the Interest in the Parcel:

☐ Category I (less than \$10,000)☐ Category II (\$10,000-\$49,999)☐ Category III (\$50,000-\$100,000)☐ Category IV (more than \$100,000)☐ Filer ☐ Spouse ☐ Both

Location of Property:

State: _____ Parish/County: _____

Description of Property: _____

Value of the Interest in the Parcel:

☐ Category I (less than \$10,000)☐ Category II (\$10,000-\$49,999)☐ Category III (\$50,000-\$100,000)☐ Category IV (more than \$100,000)☐ Filer ☐ Spouse ☐ Both

Location of Property:

State: _____ Parish/County: _____

Description of Property: _____

Value of the Interest in the Parcel:

☐ Category I (less than \$10,000)☐ Category II (\$10,000-\$49,999)☐ Category III (\$50,000-\$100,000)☐ Category IV (more than \$100,000)*** You are required to disclose the location by state and parish/county.***** You are required to provide a brief description of the immovable property and its fair market value or use value (determined by the assessor for purposes of ad valorem taxes.)**

LOUISIANA BOARD OF ETHICS

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<https://eap.ethics.la.gov/PFDOnline>**Schedule F: Filer/Spouse Income from the****State, Political Subdivisions, and/or Gaming Interests**☐ Check if not applicable☐ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☐ Political Subdivision ☐ Gaming Interest

Name of Business (if applicable): _____

Name of Income Source: _____

Address: _____

City, State, Zip: _____

Amount of Income (exact dollar amount): \$ _____

☐ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☐ Political Subdivision ☐ Gaming Interest

Name of Business (if applicable): _____

Name of Income Source: _____

Address: _____

City, State, Zip: _____

Amount of Income (exact dollar amount): \$ _____

☐ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☐ Political Subdivision ☐ Gaming Interest

Name of Business (if applicable): _____

Name of Income Source: _____

Address: _____

City, State, Zip: _____

Amount of Income (exact dollar amount): \$ _____

☐ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☐ Political Subdivision ☐ Gaming Interest

Name of Business (if applicable): _____

Name of Income Source: _____

Address: _____

City, State, Zip: _____

Amount of Income (exact dollar amount): \$ _____

* You are required to complete SCHEDULE F if you or your spouse received income (includes any income from public source such as employment income, retirement, etc.) from the State, any political subdivision, and/or a gaming interest OR if a business in which you or your spouse owns an interest which exceeds 10% (either individually or collectively) received income from the aforementioned sources.

* "Income" (for a business) means gross income less costs of goods sold, and operating expenses.

* "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.

* The definitions for (and examples of) *political subdivision*, *gaming interest*, and *business* are found in the *Instructions Section* of this form.

LOUISIANA BOARD OF ETHICS

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<https://eap.ethics.la.gov/PFDOnline>**Schedule G: Income Received from Employment**☐ Check if not applicable

☐ Filer ☐ Spouse ☐ Full-time ☐ Part-time
Name of Employer: _____
Address: _____
City, State, Zip: _____
Nature of Services (pursuant to such employment): _____
Amount of Income: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999)
☒ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)

☐ Filer ☐ Spouse ☐ Full-time ☐ Part-time
Name of Employer: _____
Address: _____
City, State, Zip: _____
Nature of Services (pursuant to such employment): _____
Amount of Income: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999)
☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)

☐ Filer ☐ Spouse ☐ Full-time ☐ Part-time
Name of Employer: _____
Address: _____
City, State, Zip: _____
Nature of Services (pursuant to such employment): _____
Amount of Income: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999)
☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)

☐ Filer ☐ Spouse ☐ Full-time ☐ Part-time
Name of Employer: _____
Address: _____
City, State, Zip: _____
Nature of Services (pursuant to such employment): _____
Amount of Income: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999)
☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)

* You are required to complete SCHEDULE G to disclose the income received by you or your spouse for each full-time or part-time employment position held.

* "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.

* Income that is reported on SCHEDULE F does not have to be restated on SCHEDULE G.

* Income received through self-employment is reported on SCHEDULE H, unless it is reported on Schedule F.

LOUISIANA BOARD OF ETHICS

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Schedule H: Income Received from Business

☐ Check if not applicable

AGGREGATE AMOUNT OF INCOME RECEIVED FROM BUSINESS:

- ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999)
☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)

☐ Filer ☐ Spouse

Name of Business: _____

Address: _____

City, State, Zip: _____

Nature of services rendered or reason income was received: _____

☐ Filer ☐ Spouse

Name of Business: _____

Address: _____

City, State, Zip: _____

Nature of services rendered or reason income was received: _____

☐ Filer ☐ Spouse

Name of Business: _____

Address: _____

City, State, Zip: _____

Nature of services rendered or reason income was received: _____

- * You are required to complete SCHEDULE H if you or your spouse received income from a business.
- * "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.
- * Income reported on SCHEDULE F or G does not have to be restated on SCHEDULE H.
- * Income received through *self-employment* is reported on SCHEDULE H.
- * "Business" means any corporation, partnership, limited liability company, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.

LOUISIANA BOARD OF ETHICS

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<https://eap.ethics.la.gov/PFDOnline>**Schedule I: Other Income** (any other income that exceeds \$1,000)☐ Check if not applicable☐ Filer ☐ Spouse

Description of Income: _____

Nature of services rendered or reason income was received: _____

Amount of Income: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999)
☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)☐ Filer ☐ Spouse

Description of Income: _____

Nature of services rendered or reason income was received: _____

Amount of Income: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999)
☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)☐ Filer ☐ Spouse

Description of Income: _____

Nature of services rendered or reason income was received: _____

Amount of Income: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999)
☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)

*** You are required to complete SCHEDULE I if you or your spouse received any other type of income (includes any income from private source such as rental income, federal retirement, etc.) that exceeded \$1,000.**

*** "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.**

*** You are not required to report income that is derived from child support and alimony payments contained in a court order, or from disability payments from any source.**

*** Income that is reported on SCHEDULE F, G, or H does not have to be restated on SCHEDULE I.**

*** Income from retirement accounts not reported on Schedule F should be included on Schedule I.**

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Schedule J: Investment Holdings (an investment holding that exceeds \$5,000)

☐ Check if not applicable

☐ Filer ☐ Spouse ☐ Both

Name of Security: _____

Description of Security: _____

☐ Filer ☐ Spouse ☒ Both

Name of Security: _____

Description of Security: _____

☐ Filer ☐ Spouse ☐ Both

Name of Security: _____

Description of Security: _____

☐ Filer ☐ Spouse ☐ Both

Name of Security: _____

Description of Security: _____

* You are required to complete SCHEDULE J if you or your spouse holds investment securities where each investment security has a value that exceeds \$5,000.

* You are not required to disclose variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, and cash/cash equivalent investments.

* You are not required to disclose information concerning any property held and administered for any person other than you or your spouse under a trust, tutorship, curatorship, or other custodial instrument.

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<https://eap.ethics.la.gov/PFDOnline>**Schedule K: Transactions** (a transaction that exceeds \$5,000)☐ Check if not applicable

☐ Filer ☐ Spouse ☐ Both Transaction Date: _____ Description of Transaction: _____ Amount of Transaction: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999) ☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)
☐ Filer ☐ Spouse ☐ Both Transaction Date: _____ Description of Transaction: _____ Amount of Transaction: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999) ☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)
☐ Filer ☐ Spouse ☐ Both Transaction Date: _____ Description of Transaction: _____ Amount of Transaction: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999) ☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)
☐ Filer ☐ Spouse ☐ Both Transaction Date: _____ Description of Transaction: _____ Amount of Transaction: ☐ Category I (less than \$10,000) ☐ Category II (\$10,000-\$49,999) ☐ Category III (\$50,000-\$100,000) ☐ Category IV (more than \$100,000)

*** You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

*** You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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<https://eap.ethics.la.gov/PFDOnline>

Schedule L: Liabilities (a liability that exceeds \$10,000)

☐ Check if not applicable

☐ Filer ☐ Spouse Name of Creditor: _____ Address: _____ City, State, Zip: _____ Name of Guarantor (If applicable): _____
☐ Filer ☐ Spouse Name of Creditor: _____ Address: _____ City, State, Zip: _____ Name of Guarantor (If applicable): _____
☐ Filer ☐ Spouse Name of Creditor: _____ Address: _____ City, State, Zip: _____ Name of Guarantor (If applicable): _____

* You are required to complete SCHEDULE L if you or your spouse owes any liability which exceeds \$10,000 on the last day of the reporting period.

* You are not required to disclose any loan secured by movable property, if such loan does not exceed the purchase price of the movable property which secures the loan.

* You are not required to disclose any liability, secured or unsecured, which is guaranteed by you or your spouse for a business in which you or your spouse owns any interest, provided that the liability is in the name of the business and, if the liability is a loan, that you or your spouse does not use proceeds from the loan for personal use unrelated to business.

* You are not required to disclose any loan by a licensed financial institution which loans money in the ordinary course of business.

* You are not required to disclose any liability resulting from a consumer credit transaction as defined in R.S. 9:3516(13).

* You are not required to disclose any loan from an immediate family member, unless such family member is a registered lobbyist, or his principal or employer is a registered lobbyist, or he employs or is a principal of a registered lobbyist, or unless such family member has a contract with the State.

* "Consumer Credit Transaction" in R.S. 9:3516(13) means a consumer loan or a consumer credit sale but does not include a motor vehicle credit transaction made pursuant to R.S. 6:969.1 et seq.