

# Form-Specific Questions

The numbers listed below correspond directly to the numbers listed on the form.

## Question #1

Items typically listed under assets include:

- any single block of stock, public bonds, or commodity futures worth \$10,000 or more in one company (name only - NOT THE AMOUNT)
- investment real estate, farmland, and rental property (other than your personal residence - list the city and state only)
- sector mutual and sector exchange traded fund –funds of more than \$10,000 invested in a particular industry - or business beneficial interests in trusts
- business interests
- partnership interests

Spouse includes a party to a marriage, civil union, or a registered domestic partner.

You do not need to list savings/checking accounts, CD's, notes/bonds/securities issued by a government entity, college savings plans that qualify as tuition plans, Medicare benefits, inheritances and bequests (other than beneficial interests in trusts), tangible personal property, retirement accounts, diversified investment funds, or personal residences and vehicles.

## Question #2

Please list the source of income/name of asset for any income or capital gains and date sold, if applicable, reported on your federal tax return more than \$7,500. Revenue from leases, rentals, royalties, prizes, awards, forgiveness of debt, any annuities earned from trusts in excess of \$7,500 should also be reported for this question. This includes income reported on but not limited to form 1099, W-2, and K-1.

For pension income or other income from whatever source derived, (for private practices or consulting work) just list the name of the practice or company).

## Question #3

Creditor means an individual, organization, or other business entity to whom money or its equivalent is owed, no matter whether that obligation is secured or unsecured, except that if a filer makes a loan to members of his or her family, then that filer does not, by making such a loan, become a creditor.

Debt means any money or monetary obligation owed at any time during the preceding calendar year to an individual, company, or other organization, other than a loan that is from a financial institution, government agency, or business entity and that is granted on terms made available to the general public. "Debt" includes but is not limited to: personal loans from friends or business associates, business loans made outside the lender's regular course of business, and loans made at below market rates

Family includes a filer's spouse, children, step-children, parents, step-parents, siblings, step-siblings, half-siblings, sons-in-law, daughters-in-law, grandparents, and grandchildren, as well as the parents and grandparents of the filer's spouse, and any person living with the filer.

Any remaining debt incurred in the previous calendar year in excess of \$10,000 owed by you, you and your spouse, and you and your minor child should be listed by noting the name of the creditor.

#### Question #4

Spouse includes a party to a marriage, civil union, or a registered domestic partner.

Here, you need to list the name of any unit of government and position title or nature of services for which you or your spouse were an employee, contractor, or office holder during the preceding calendar year, except for your university position (the position requiring you to file). All positions must be listed, regardless of compensation. Examples include:

- School Board
- Zoning Board
- County Board
- Park Board
- Army Guard
- Air Guard
- employment by other state agency or state university
- previously held positions with other state agencies

Do not list your University of Illinois position.

#### Question #5

Family includes a filer's spouse, children, step-children, parents, step-parents, siblings, step-siblings, half-siblings, sons-in-law, daughters-in-law, grandparents, and grandchildren, as well as the parents and grandparents of the filer's spouse, and any person living with the filer.

For this question, list any lobbyists in which you maintain an economic relationship with. Also, list any family members who are lobbyist registered within the State of

Illinois. For example, if your spouse or business partner is a lobbyist, this must be listed. You must list their name and the relationship to you: e.g., family member name, economic.

#### Question #6

For this question, you must list any gift received where the value, singly or in aggregate, was greater than \$500. Honorarium or honoraria are considered gifts for the purpose of this question. You do not need to list the amount, just the name of the giver.

You do not need to list gifts from family members unless they are registered lobbyists in Illinois.

#### Question #7

Family includes a filer's spouse, children, step-children, parents, step-parents, siblings, step-siblings, half-siblings, sons-in-law, daughters-in-law, grandparents, and grandchildren, as well as the parents and grandparents of the filer's spouse, and any person living with the filer.

Spouse includes a party to a marriage, civil union, or a registered domestic partner.

Utilities include electric, natural gas, telecommunications, water, and sewer.