

CONFIDENTIAL

**OFFICE OF THE ETHICS COMMISSIONER
PROVINCE OF ALBERTA**



**MEMBER'S PRIVATE DISCLOSURE STATEMENT
FIRST TIME FILERS: FORM 2:
MEMBER'S SPOUSE OR ADULT INTERDEPENDENT PARTNER
As at April 1, 2009**

MEMBER'S NAME:

NAME OF MEMBER'S SPOUSE*:

NAME OF MEMBER'S ADULT INTERDEPENDENT PARTNER*:

* See page 8 for definitions.

STATEMENT OF INCOME

1. INCOME FROM THE PROVINCE OF ALBERTA*. List all income your spouse or adult interdependent partner has received from any ministry, agency, board, commission, or committee of the Province of Alberta or from the Legislative Assembly of Alberta in the immediate past calendar year and income expected to be received within the current calendar year. Reference: *Conflicts of Interest Act*, sections 12(d), 14(3), 14(4)(b), and 14(6).

| Immediate Past Calendar Year | Source | Description of Income | Amount |
|-------------------------------------|---------------|------------------------------|---------------|
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| Current Calendar Year (expected income to year-end) | Source | Description of Income | Amount |
|--|---------------|------------------------------|---------------|
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2. INCOME FROM ALL OTHER SOURCES*. List all other income your spouse or adult interdependent partner has received in the immediate past calendar year and income expected to be received within the current calendar year. Reference: *Conflicts of Interest Act*, sections 12(d), 14(3), 14(4)(b), and 14(6).

| Immediate Past Calendar Year | Source | Description of Income | Amount |
|------------------------------|--------|-----------------------|--------|
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| Current Calendar Year (expected income to year-end) | Source | Description of Income | Amount |
|---|--------|-----------------------|--------|
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* Should your spouse or adult interdependent partner receive income other than on a calendar year basis, please indicate the time period which applies to that particular circumstance (example: the fiscal year used by a private business interest or short-term committee or task force assignment).

STATEMENT OF ASSETS

1. REAL PROPERTY INTERESTS. List all interests in land held by your spouse or adult interdependent partner, including family residences, recreational property, leasehold interests, and mortgages, whether or not your spouse or adult interdependent partner is registered as owner, showing separately which properties are used primarily as a residence or for recreational purposes by you or one of your family. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a) and (c), and 14(6).

| Residence(s) | Address/Legal Description | Nature of Interest* | Value |
|--------------|---------------------------|---------------------|-------|
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| Recreational | Address/Legal Description | Nature of Interest* | Value |
|--------------|---------------------------|---------------------|-------|
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| "Other" (e.g. "farm," "rental," etc.) | Address/Legal Description | Nature of Interest* | Value |
|---|---------------------------|---------------------|-------|
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* Examples of Nature of Interest: joint tenancy, tenancy in common, joint property, common property, part ownership (indicate percentage)

2. BANK AND OTHER DEPOSITS. List all money your spouse or adult interdependent partner has on deposit with a chartered bank, trust company, or other financial institution in Alberta that is lawfully entitled to accept deposits. (Account numbers are not required.) Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

| Name of Financial Institution | Nature of Account | Approx. Amount |
|-------------------------------|-------------------|----------------|
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3. CANADA SAVINGS BONDS AND GOVERNMENT SECURITIES. List all Canada Savings Bonds, Alberta Capital Bonds, and other investments or securities of fixed value held by your spouse or adult interdependent partner and issued or guaranteed by any level of government in Canada or any agency of such government. (Serial numbers are not required.) Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

NOTE: If these instruments are held in an RRSP, please include them in section 6 of this Part and not in this section.

| Description of Bond or Security | Face Value |
|---------------------------------|------------|
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4. GUARANTEED INVESTMENT CERTIFICATES, TERM DEPOSITS, AND SIMILAR INSTRUMENTS. List all guaranteed investment certificates (GICs), term deposits, and all other similar financial instruments held by your spouse or adult interdependent partner. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

NOTE: If these instruments are held in an RRSP, please include them in section 6 of this Part and not in this section.

| Name of Issuer | Description of Instrument | Amount Invested |
|----------------|---------------------------|-----------------|
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5. MUTUAL FUNDS. List all holdings in mutual funds by your spouse or adult interdependent partner. Please indicate with an asterisk (*) which mutual funds held by you are open-ended mutual funds. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

NOTE: If these instruments are held in an RRSP, please include them in section 6 of this Part and not in this section.

| Name of Fund (If it is more convenient, you may attach a recent statement from your financial advisor or the financial institution listing the holdings in your account) | No. of Units | Value |
|--|--------------|-------|
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6. REGISTERED RETIREMENT SAVINGS PLANS AND SIMILAR INSTRUMENTS. List all RRSPs/LIRAs/RIFs, etc., owned by your spouse or adult interdependent partner, and indicate those plans that are self-directed. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

| Name of Institution | Please ✓ if this account is self-directed | List of Holdings* | Value |
|---------------------|---|-------------------|-------|
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* If it is more convenient, you may attach a recent statement from your financial advisor or the financial institution listing the holdings in your account.

7. PENSION RIGHTS. List all pension rights belonging to your spouse or adult interdependent partner, excluding the Canada Pension Plan. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), and 14(6).

| Name of Plan | Administered by | Years of Pensionable Service |
|--------------|-----------------|------------------------------|
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8. LIFE INSURANCE POLICIES. List all life insurance policies owned by your spouse or adult interdependent partner. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), and 14(6).

| Issuer | Type of Policy (e.g. Term, Life) | Cash Surrender Value |
|--------|----------------------------------|----------------------|
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9. ANNUITIES. List all annuities held by your spouse or adult interdependent partner. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

| Issuer | Description | Value |
|--------|-------------|-------|
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10. SECURITIES AND OTHER INTERESTS IN PUBLIC CORPORATIONS. List all securities or other interests held by your spouse or adult interdependent partner in public corporations. Reference: *Conflicts of Interest Act*, sections 1(1)(i) and (j), 1(2), 1(3), 12(a), 14(3), 14(4)(a), and 14(6). Members of the Executive Council and the Leader of the Opposition should also review sections 20, 22 and 23.

NOTE: If these instruments are held in an RRSP, please include them in section 6 of this Part and not in this section.

| Name of Public Corporation | Description, inc. number of shares (if it is more convenient for you, you may attach a recent statement or print-out from a financial advisor/institution) | Value |
|----------------------------|--|-------|
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11. PRIVATE BUSINESS INTERESTS. List all private business interests including shares or debt interests in private corporations, interests in sole proprietorships, partnerships, and joint ventures held by your spouse or adult interdependent partner. **NOTE:** Do not include the private corporations listed under paragraph 2 of Part I. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

| Name of Business | Business Activities | Nature of Interest (i.e. sole proprietorship, 50%, etc.) | Value |
|------------------|---------------------|--|-------|
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12. HOUSEHOLD AND PERSONAL PROPERTY. List personal property with a commercial resale value over \$1,000. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a) and (d), and 14(6). **NOTE:** Things used personally by a Member or one of the Member's family primarily for transportation, household, educational, recreational, social or esthetic purposes will not be disclosed publicly.

| Description of Property | Approximate Value |
|-------------------------|-------------------|
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13. OTHER SIGNIFICANT ASSETS. List all other significant assets owned by your spouse or adult interdependent partner. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

| Description of Asset | Approximate Value |
|----------------------|-------------------|
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STATEMENT OF LIABILITIES

1. MORTGAGES. List all mortgages in respect of which your spouse or adult interdependent partner owes money. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

| Name of Person/Institution Who Holds the Mortgage | Property on which Mortgage is Held | Approximate Amount |
|---|------------------------------------|--------------------|
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2. LOANS/LINES OF CREDIT. List all loans other than mortgages in respect of which your spouse or adult interdependent partner owes money. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

| Person/Institution to Whom Money is Owed | Reason for Loan/Line of Credit | Approximate Amount |
|--|--------------------------------|--------------------|
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3. GUARANTEES. List all guarantees given by your spouse or adult interdependent partner. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a), and 14(6).

| Name of Creditor | Person/Entity for whom guarantee is given | Amount |
|------------------|---|--------|
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4. UNPAID MUNICIPAL REALTY TAXES. List any unpaid realty taxes owing by your spouse or adult interdependent partner (other than for the current tax year). Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a) and (e), and 14(6). NOTE: Unpaid taxes under the *Municipal Government Act* or the *School Act* will be disclosed publicly.

| Property Address | Municipality | Taxation Period | Amount |
|------------------|--------------|-----------------|--------|
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5. UNPAID INCOME TAX. List all income taxes unpaid and owing by your spouse or adult interdependent partner. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a) and (e), and 14(6). NOTE: Unpaid income taxes will not be disclosed publicly.

| Year | Amount Owing |
|------|--------------|
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6. SUPPORT OBLIGATIONS. List all support obligations upon your spouse or adult interdependent partner. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), 14(4)(a) and (f), and 14(6). NOTE: Support obligations will not be disclosed publicly.

| Relationship to Member | Amount of Obligation |
|------------------------|----------------------|
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7. OTHER SIGNIFICANT LIABILITIES. List all other significant liabilities, including amounts owing on a personal credit card over \$1,000, carried for more than three months and unpaid at the date of filing. Reference: *Conflicts of Interest Act*, sections 12(a) and (b), 14(3), 14(4)(a), and 14(6).

| To whom is the liability owed? | Description | Amount |
|--------------------------------|-------------|--------|
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STATEMENT OF FINANCIAL INTERESTS

List all other significant financial interests held by your spouse or adult interdependent partner. Reference: *Conflicts of Interest Act*, sections 12(a), 14(3), and 14(6).

| Description of Interests | Value |
|--------------------------|-------|
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DEFINITIONS:

Section 1(1)(l) of the *Conflicts of Interest Act*: “spouse” means the husband or wife of a married person who is a Member but does not include a spouse who is living separate and apart from the Member if the Member and spouse have separated pursuant to a written separation agreement or if their support obligations and family property have been dealt with by a court order.

An “adult interdependent partner” as defined in section 3 of the *Adult Interdependent Relationships Act* means

- 3(1)** Subject to subsection (2), a person is the adult interdependent partner of another person if
- (a) the person has lived with the other person in a relationship of interdependence
 - (i) for a continuous period of not less than 3 years, or
 - (ii) of some permanence, if there is a child of the relationship by birth or adoption, or
 - (b) the person has entered into an adult interdependent partner agreement with the other person under section 7.
- (2) Persons who are related to each other by blood or adoption may only become adult interdependent partners of each other by entering into an adult interdependent partner agreement under section 7.

“Relationship of interdependence” means “a relationship outside marriage in which any 2 persons

- (i) share one another’s lives,
- (ii) are emotionally committed to one another, and
- (iii) function as an economic and domestic unit.”