

**CONFIDENTIAL**

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



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

NAME OF MEMBER:

NAME OF MEMBER'S SPOUSE OR ADULT INTERDEPENDENT PARTNER:

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 "(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, (2) are emotionally committed to one another, and (iii) function as an economic and domestic unit."

## STATEMENT OF INCOME

1. **INCOME FROM THE PROVINCE OF ALBERTA.** List any additional sources of income not previously disclosed. Please also identify any sources of income your spouse or adult interdependent partner no longer receives as at the date of disclosure.

New Sources of Income			
Description, including type (salary, wages, dividend, etc.) and from what source	Amount	Date source of income commenced	
Source:	Type:		
Source:	Type:		

Delete Source of Income	
Indicate Source	Date of termination

2. **INCOME FROM ALL OTHER SOURCES.** List any additional sources of income your spouse or adult interdependent partner received since your last disclosure and any sources of income which your spouse or adult interdependent partner no longer receives.

New Sources of Income			
Description, including type (salary, wages, dividend, etc.) and from what source	Amount	Date source of income commenced	
Source:	Type:		
Source:	Type:		

Delete Source of Income	
Indicate Source	Date of termination

## STATEMENT OF ASSETS

**1. REAL PROPERTY INTERESTS.**

(A) **Residence:** Has your spouse or adult interdependent partner changed personal residences? Yes  No  If your spouse or adult interdependent partner has purchased new property, please provide the details below.

Address of Property Sold	Address of Property Purchased	Nature of Interest in new Property	Value of New Property
Mortgage on sold property paid off? Yes <input type="checkbox"/> No <input type="checkbox"/>			

(B) **Recreational Property:** Has your spouse or adult interdependent partner bought or sold recreational property since your last disclosure? Yes  No  If you responded “yes,” please provide details below:

Address of Property Sold	Address of Property Purchased	Nature of Interest in new Property	Value of New Property
Mortgage on sold property paid off? Yes <input type="checkbox"/> No <input type="checkbox"/>			

(C) **Other Property Interests of the Member:** Has your spouse or adult interdependent partner purchased or sold any other property since your last disclosure? Yes  No  If you responded “yes,” please provide details below:

Address of Property Sold	Address of Property Purchased	Nature of Interest in new Property	Value of New Property
Mortgage on sold property paid off? Yes <input type="checkbox"/> No <input type="checkbox"/>			

**2. BANK AND OTHER DEPOSITS.** Has your spouse or adult interdependent partner changed financial institutions? Yes  No  If “yes,” please provide the name of the institution your spouse or adult interdependent partner is now dealing with and the nature of the deposit.

No longer dealing with:	New account with:	Type of new account:	Amount in new account:

3. **CANADA SAVINGS BONDS AND GOVERNMENT SECURITIES.** Are there any changes to your spouse's or adult interdependent partner's holdings of CSBs, Alberta Capital Bonds, or any other government securities since your last disclosure? Yes  No  If "yes," please provide further information below:

Cashed in:	
Type of instrument:	Value:

Purchased:	
Type of instrument:	Value:

4. **GUARANTEED INVESTMENT CERTIFICATES, TERM DEPOSITS, AND SIMILAR INSTRUMENTS.** Has your spouse or adult interdependent partner purchased or sold any of the types of instruments listed above since your last disclosure? Yes  No  If "yes," please provide further information below. If you wish, you may attach the most recent statement your spouse or adult interdependent partner has received from a financial advisor.

Cashed in:		
Description of Instrument:	Financial Institution:	Amount:

Purchased:		
Description of Instrument:	Financial Institution:	Amount:

5. **MUTUAL FUNDS.** This section deals solely with mutual funds held outside your spouse's or adult interdependent partner's RRSP. Are there any changes with respect to mutual funds held by your spouse and previously disclosed by you? Yes  No  If "yes," please provide information below. If you wish, you may attach your spouse's or adult interdependent partner's most recent statement from a financial advisor.

Sold:		
Name of Fund:	No. of Units (indicate "all" if all units have been sold)	Value:

Purchased:		
Name of Fund:	No. of Units	Value:

6. **REGISTERED RETIREMENT SAVINGS PLANS/RRIFs/LIRAs.** Has your spouse or adult interdependent partner made any changes with respect to his or her RRSPs/RRIFs/LIRAs? Yes  No   
 If more convenient, you may attach a copy of your spouse's or adult interdependent partner's most recent statement.

Financial Institution changed	From:	To:
Funds added	Amount:	To which account?
Funds withdrawn	Amount:	From which account?
New account:	With what institution:	Description of holdings (i.e. GIC, list of mutual funds, etc.) and amount:

Changes in the holdings within the RRSP/RRIF/LIRA		
Account with what institution?	Describe new holdings (indicate type of holding and amount)	List any holdings sold (indicate type of holding and amount)

7. **PENSION RIGHTS.** Are there any changes with respect to pension rights previously disclosed by your spouse or adult interdependent partner (other than the number of years of service)? Yes  No

Rights acquired in:	Rights relinquished from:

8. **INSURANCE POLICIES.** Has your spouse or adult interdependent partner made any changes with respect to insurance policies previously disclosed by you? Yes  No

New policy with:	Amount:
Policy terminated with:	
Carrier changed:	From: To:

9. **ANNUITIES.** Has your spouse or adult interdependent partner made any changes with respect to annuities? Yes  No

New annuity with:		Amount:
Policy terminated with:		
Issuer changed:	From:	To:

10. **SECURITIES AND OTHER INTERESTS IN PUBLIC CORPORATIONS.** Has your spouse or adult interdependent partner acquired or sold any securities since your last disclosure? Yes  No  If more convenient, you may attach the most current statement from a financial advisor.

Purchased		
Name of corporation	No. of shares purchased	Value:

Sold		
Name of corporation	No. of shares sold (indicate "all" if all were sold)	Value:

11. **PRIVATE BUSINESS INTERESTS.** (Note: this section does not include those private corporations listed under paragraph 2 of Part I.) Has your spouse or adult interdependent partner acquired or sold an interest in a private corporation since your last disclosure? Yes  No

Interest Acquired		
Name of corporation	Description of activities	Value:

Interest Sold	
Name of corporation	Value:

12. **HOUSEHOLD AND PERSONAL PROPERTY.** If your spouse or adult interdependent partner has acquired or sold any significant personal property since your last disclosure, please list that property.

Acquired:	
Describe item:	Value:

Sold	
Describe item:	Value:

13. **OTHER SIGNIFICANT ASSETS.** Please identify any other significant assets purchased or sold by your spouse or adult interdependent partner since your last disclosure.

Acquired:	
Describe asset:	Value:

Sold	
Describe asset:	Value:

**STATEMENT OF LIABILITIES**

1. **MORTGAGES.** Other than normal pay down, are there any changes with respect to mortgages held by your spouse or adult interdependent partner since your last disclosure? Yes  No

Mortgage has been paid in full: Yes  No

Lender changed from:	To:

New mortgage obtained from:	Property Address:	In the amount of:

2. **LOANS/LINES OF CREDIT.** Other than normal pay down, are there any changes with respect to loans or lines of credit held by your spouse or adult interdependent partner since your last disclosure? Yes  No

Loans		
With (name of Institution):		Paid in full? Yes <input type="checkbox"/> No <input type="checkbox"/>
Loan transferred from:	To:	Amount:
New loan with (name of institution):	Purpose:	Amount:

Existing Line of credit			
Current balance at \$0 :	Yes <input type="checkbox"/> No <input type="checkbox"/>	Increased to:	Decreased to:
If not \$0, current balance is:			

New line of credit		
Name of institution:	Purpose:	Amount:

3. **GUARANTEES.** Are there any changes with respect to guarantees given by your spouse or adult interdependent partner since your last disclosure? Yes  No

New Guarantees			
Financial institution:	Party Guaranteed:	Purpose:	Amount

Guarantees Removed	
Financial institution	Party Guaranteed:

4. **UNPAID MUNICIPAL REALTY TAXES.** Other than for the current tax year, does your spouse or adult interdependent partner owe municipal realty taxes? Yes  No

To which municipality:	Tax Year:	Amount:
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5. **UNPAID INCOME TAX.** Other than for the current tax year, does your spouse or adult interdependent partner owe income tax? Yes  No

Tax Year:	Amount:
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6. **SUPPORT OBLIGATIONS.** Are there any changes with respect to support obligations by your spouse or adult interdependent partner, if any, previously disclosed by you? Yes  No

Outline the nature of the change:
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7. **OTHER SIGNIFICANT LIABILITIES.** (This section includes amounts owing on personal credit cards.) Does your spouse or adult interdependent partner have any other significant liabilities not previously disclosed? Yes  No

New Liabilities		
Financial Institution or other entity:	Description (e.g. Visa, MasterCard, etc.)	Amount owing:

Liability removed	
Financial institution or other entity:	Description (e.g. Visa, MasterCard, etc.)

**STATEMENT OF FINANCIAL INTERESTS**

If your spouse or adult interdependent partner has acquired any new financial interests since your last disclosure, please provide a brief description of the nature of the interest and the amount of that interest.

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If your spouse or adult interdependent partner no longer has a financial interest previously disclosed, please provide a brief explanation of that change.

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