

**STATEMENT OF ECONOMIC INTERESTS
REQUIRED BY ILLINOIS CODE OF
JUDICIAL CONDUCT (2023), CANON 3,
RULE 3.15**

INSTRUCTIONS

1. You (the “filing judge”) are required to report economic interests owned by you or your spouse, domestic partner, or minor children living with you (collectively, “Covered Persons”). You shall keep informed about your economic interests and make a reasonable effort to keep informed about the economic interests of the other Covered Persons.
2. Economic interests must be reported as of the “Record Date,” which is December 31 of the year before the date of this Statement.
3. For each category of economic interests, include all assets valued in excess of \$1,000 in which any Covered Person has an ownership interest, including those owned in an Individual Retirement Account (IRA), 401(k) plan, 403(b) plan, 457 plan, deferred compensation plan administered by the State of Illinois, 529 college savings plan, Uniform Gift to Minor Act account, or similar accounts (collectively, “Retirement/Investment Accounts”).
4. With respect to dividends, interest, rent, royalties, or distributions (collectively, “income”), report any income received during the 12-month period before the Record Date. Only report whether income was received, and not any amount.
5. Attach additional pages if the space provided is insufficient.

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1. NAME OF FILING JUDGE: _____
2. COURT: _____ DISTRICT/CIRCUIT _____.
3. CURRENT ECONOMIC INTERESTS.

a. FINANCIAL INSTITUTIONS.

- i. List each financial institution in which any Covered Person has assets valued in excess of \$1,000, including assets held in savings accounts, checking accounts, money market accounts, certificates of deposits, or “Retirement/Investment Accounts” (as defined in Paragraph 3 of the Instructions).
- ii. Do not provide account numbers. Multiple accounts at the same financial institution need not be separately listed.

Financial Institution

☐ Check box if none.

b. STOCKS, BONDS, ETF, AND MUTUAL FUNDS.

- i. List stocks, bonds, exchange traded funds (ETF), and mutual funds valued in excess of \$1,000 owned by a Covered Person, including such assets held in a Retirement/Investment Account (as defined in Paragraph 3 of the Instructions).
- ii. Do not list (1) multiple holdings of the same security (*e.g.*, multiple U.S. Treasury Notes), (2) multiple securities issued by the same issuer, (3) different mutual funds in the same mutual fund family, (4) assets owned

by a mutual fund or ETF, or (5) deposits or proprietary interests held as a member of a mutual savings association or credit union.

Name of Issuer or Mutual Fund or ETF Family	Nature of Security (i.e., stock, bond, mutual fund, ETF)

☐ Check box if none.

c. REAL ESTATE.

- i. List all real estate in which any Covered Person has an ownership interest, including a beneficial interest in a land trust.
- ii. For each personal residence of a Covered Person or a Covered Person's family member, state "personal residence" and do not provide address.

Address (other than for a personal residence)	Type of Property (e.g., single-family residence, condominium, farmland, etc.)	Income Received? (Yes/No)

☐ Check box if none.

- d. PENSION PLANS. List any nonjudicial pension plan in which any Covered Person has an interest. This does not include (1) Individual Retirement Accounts, 401(k) plans, 403(b) plans, or 457 plans or (2) any benefits from the Social Security Administration.

Plan Sponsor/Administrator	Income Received? (Yes/No)

☐ Check box if none.

- e. INTERESTS IN INTANGIBLE PROPERTY. List any interest valued in excess of \$1,000 in intangible property, not reported above, owned by any Covered Person. This includes, but is not limited to, an interest in any partnership, corporation, limited liability company, trust, copyright, trademark, or chose in action.

Description of Intangible Property	Nature of Interest	Income Received? (Yes/No)

☐ Check box if none.

- f. EMPLOYMENT. List every paid employment of a Covered Person, with the exception of the filing judge's judicial employment.

Name of Employer

☐ Check box if none.

- g. **NONINVESTMENT INCOME.** List the nature of all noninvestment income, other than employment income, received by a Covered Person from any one source that totals at least \$1,000 in the 12-month period before the Record Date. Income includes, but is not limited to, fees, commissions, payments for personal services, and royalties. Do not include the amount.

Source of Noninvestment Income	Nature of Noninvestment Income (Commission, Royalty, etc.)

☐ Check box if none.

4. INDEBTEDNESS.

- a. List all creditors to whom amounts in excess of \$1,000 were owed by any Covered Person on the Record Date and identify any sureties or guarantors of any such indebtedness.
- b. Do not include any debt, including credit card debt, that was paid in its entirety within 90 days of when it was incurred. For these purposes, medical or dental expenses are not considered to be incurred until the amount of the Covered Person's financial responsibility is determined after the application of any insurance benefits.
- c. The amount of each listed indebtedness shall be reported by reference to a letter category, as follows: Category A – \$1,000.01-\$5,000; Category B – \$5000.01-\$15,000; Category C –\$15,000.01- \$50,000; Category D – \$50,000.01-\$100,000; Category E – \$100,000.01-\$250,000; and Category F – greater than \$250,000. This categorization shall be reported as of the Record Date.

Name of Creditor	Valuation Category on Record Date	Identity of any Surety or Guarantor of the Indebtedness

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5. RELATIONSHIPS WITH LAWYERS.

- a. Identify all persons, other than Covered Persons, known by the filing judge to be licensed or registered to practice law who, at any time within the 12-month period before the Record Date, was a co-owner with a Covered Person of any economic interest, a co-obligor with or a creditor of a Covered Person, or the payor to a Covered Person of any income, payments, or benefits, required to be disclosed in Paragraphs 3 or 4. State the nature of each economic interest, indebtedness, or income, payments, or benefits and whether it is ongoing or terminated as of the Record Date.

Name of Lawyer	Nature of Economic Interest, Indebtedness, or Income, Payments, or Benefits	Ongoing or Terminated

☐ Check box if none.

- b. Identify all lawyers with whom the filing judge was associated in the private practice of law within three years of the date of this filing. The name of the firm may be substituted where the association was with five or more lawyers.

Name of Lawyer or Law Firm	Address

☐ Check box if none.

6. **BOARD SERVICE.** List every office or directorship held by a Covered Person, regardless of whether compensation is received. Do not include any uncompensated or honorary positions in educational, religious, charitable, fraternal, civic, social, or law-related organizations unless those organizations are either conducted for profit or regularly engaged in adversary proceedings in any court.

Name of Organization	Position Held	Compensation Received? (Yes/No)

☐ Check box if none.

7. **LITIGATION.**

- a. List all court cases or arbitration proceedings known to the filing judge pending on or within 12 months before the Record Date in which a Covered Person either was a party or had more than a *de minimis* financial interest (*i.e.*, a monetary interest that could not raise a reasonable question as to the judge's impartiality). Do not include (1) proceedings in which a Covered Person is a party solely in an official capacity, (2) class actions in which a Covered Person is not a named class representative, or (3) motor vehicle offenses that are punishable by fine only.

Case Name, Tribunal, and Case Number

☐ Check box if none.

- b. List all cases in which the filing judge was a referring lawyer with an economic interest that are still pending on the Record Date or that were resolved within three years before the Record Date. Include the name of the lawyer or law firm to which the case was referred.

Case Name, Court Where Pending, and Case Number	Identity of Lawyer or Law Firm to Which the Case Was Referred	Pending Case? (Yes/No)

☐ Check box if none.

8. FIDUCIARY POSITIONS. List all fiduciary positions held by the filing judge on the Record Date. Examples include service as a trustee, executor, estate administrator, guardian of the estate, or agent pursuant to a power of attorney for property. Do not include fiduciary positions held for the benefit of a family member of a Covered Person. Identify by name each person, other than a Covered Person, for whom the filing judge is serving as fiduciary.

Fiduciary Position	Name of Person for Whom the Filing Judge Is Serving as Fiduciary

☐ Check box if none.

9. HONORARIA, REIMBURSEMENT OF EXPENSES, AND WAIVERS OF FEES. List all honoraria, reimbursement of expenses, and waivers of fees (collectively, “Benefits”) that (a) either individually or in the aggregate from the same provider of the Benefits exceed \$500, and (b) were received by a Covered Person, or a guest of the filing judge in connection with an event at which the Benefits were received, during the 12-month period prior to the Record Date. Do not report (a) waivers of fees to any unit of government or (b) reimbursement or payment of expenses, or provision of resources, by any unit of government. Identify the provider of each Benefit and state the type of the recipient of each Benefit (*i.e.*, filing judge, filing judge’s guest, spouse, domestic partner, or child) rather than the specific name.

The value of each Benefit shall be reported by reference to a letter category, as follows: Category A – \$500-\$2,500; Category B – \$2,500.01- \$5,000; Category C –greater than \$5,000.

Identity of Provider of the Benefit	Description of the Benefit	Type of Recipient of the Benefit	Value of the Benefit

☐ Check box if none.

10. GIFTS. List all gifts that (a) either individually or in the aggregate from the same donor exceed \$500, and (b) were received by a Covered Person during the 12-month period prior to the Record Date. Do not include gifts between Covered Persons or between Covered Persons and any of their great-grandparents, grandparents, parents, uncles, aunts, brothers, sisters, grandchildren, great-grandchildren, nephews, and nieces. Identify the provider of each gift and state the type of the recipient of each gift (*i.e.*, filing judge, spouse, domestic partner, or child) rather than the specific name.

The value of each gift shall be reported by reference to a letter category, as follows: Category A – \$500-\$2,500; Category B – \$2,500.01- \$5,000; Category C –greater than \$5,000.

Identity of Provider of the Gift	Description of the Gift	Type of Recipient of the Gift	Value of the Gift

☐ Check box if none.

11. ADDITIONAL DISCLOSURES. List any economic interest not previously disclosed in this Statement that could create a basis for disqualification of the filing judge under Supreme Court Rule 2.11. Identify the person whose economic interest could create a basis for disqualification, but if that person is a Covered Person state the type of that Covered Person (*i.e.*, filing judge, spouse, domestic partner, or child) rather than the specific name.

Type of Covered Person or Identity of Other Person with an Economic Interest That Could Create a Basis for Disqualification	Nature of Economic Interest

☐ Check box if none.

VERIFICATION

Pursuant to Illinois Code of Judicial Conduct (2023), Canon 3, Rule 3.15, I declare that this Statement of Economic Interests, including any accompanying schedules and statements, has been examined by me and to the best of my knowledge and belief is true, correct, and complete.

(Signature of Filing Judge)

(Date)

(Printed Name of Filing Judge)