

Financial Disclosure Statements – Common Errors

Including personal information that is not required.

Do not include social security numbers anywhere on the form.

Do not list home addresses and phone numbers (page 1).

(If you are a State Officer and do not have a business address, please indicate that you list a home address and Ethics Commission investigators will delete it for public record purposes.)

Do not use the names of spouses or dependent children - use husband, wife, domestic partner, son or daughter (page 1).

Do not list the actual value of assets.

Employees should indicate a value class (pages 3, 4, 5, 6 & 8).

Officers should indicate a value class on page 5 and use check marks, not value classes, on pages 3, 4, 6, 7 & 8.

Do not provide brokerage account numbers (Schedules A & D, pages 6 & 9).

Do not attach schedules from your tax returns or brokerage account statements.

Fill out the information on the appropriate schedules.

You can print additional pages of the schedules if necessary.

Omitting required information.

Include the filing year, which is the current calendar year (page 1).

Employees should list their official State title and employer (page 1).

Officers should list their official State title on page 1, not their private employment.

Identify both the occupation and employer of a spouse or partner listed on page 1.

List the value of your State salary (page 4).

List your date of employment (page 4).

Include the value of your State pension (page 3).

(For the value of your State pension, call Pensions at 609-777-1777.)

Include an asset on the corresponding schedule when you list a value class on page 3 as follows:

If you list a value class for notes receivable, list the nature of the account on page 4, item h.5

If you list a value class for accounts receivable, list the nature of the account on page 4, item h.5

If you list a value class for government bonds, itemize on Schedule A, page 6.

If you list a value class for stocks & corporate bonds, itemize on Schedule A, page 6.

If you list a value class for an interest in contracts with government instrumentalities, itemize on Schedule B, page 7.

If you list a value class for real estate interests, itemize on Schedule C, page 8.

Include a value class when you list an asset as follows:

List gifts and gratuities, cash and non-cash, under sources of income on page 4, item h.5.

Specify the size of listed real estate interests - square footage, acres, number of rooms - on Schedule C, page 8.

Answer all questions that require a yes/no response.

Indicate n/a on sections that do not apply to you – do not leave blank fields.

Indicate when and how you completed mandatory ethics training – page 2.

List the duties and responsibilities of your State position on Schedule D when applicable – do not list only your State title or the duties of your private employment.

Repeating the same mistakes.

Review the version of your FDS that was posted on the internet to avoid repeating any errors that were corrected by our investigators and to avoid including any information that was redacted by our investigators.

Do not copy your form verbatim from last year's submission. Be sure to review your form to make any necessary changes such as additional assets, changes in value class or other new information.

Using the wrong form.

Special State Officers and State Employees are required to fill out different forms.

Be sure to use the correct form.

Be sure to use the current version of the form.

As of the 2009 filing year, all filers are required to file their FDS forms electronically.

Not reading the directions.

Directions, FAQs and a list of common errors are available on the Commission's website for review.

You may also call your ELO or one of the State Ethics Commission Investigators for assistance with filling out the form.