



## City of San Antonio, Texas

Ethics Advisory Opinion No. 2015-02

January 27, 2015

*Issued By: City Attorney's Office*

### **I. Issue:**

May a City commissioner use the short-form financial disclosure statement, if there have been few or no changes in the information disclosed by that person in a complete financial disclosure report filed within the last five years?

### **II. Inquiry**

A member of one of the City's commissions has inquired if he must submit the detailed, eight-page financial report that is required to be filed by all City board and commission members, if the shorter form could be used for this purpose.

### **III. The Ethics Code:**

The City's Ethics Code applies to City officials, City employees, and City-appointed members of City-created boards. All employees and officials are required to disclose certain financial information annually, on a form provided by the Office of the City Clerk. There are two forms, a "long form" report, consisting of eight pages, containing details of financial activity of the official or employee for the past calendar year. All board and commission members file the long-form report, as do high level City officials. Other employees file the "short form", which is two pages, and contains much less detail regarding the financial activities of the filer. These forms are reviewed by the City to ensure no conflicts of interest or in contracting occur.

#### **A. Financial Disclosure Reporting**

Sections 2-73 through 2-79 of the Ethics Code detail the requirements for submission of financial disclosure reports. Section 2-73(a)(1) provides that City executives and members of boards and commissions file the long form, and Section 2-73(a)(2) acknowledges that the elected officials already file a financial disclosure form required by the state, and requires the elected

officials to file an addendum, containing additional information useful in discerning potential conflicts or prohibited interests in contracts with the City. Section 2-74 details the contents of the disclosure form, which includes financial information of the filer as well as members of their household and business interests they hold.

Section 2-75 details the short form annual report. This report is used by all City employees not in the “specified” list discussed in Section 2-73. This report may also be used by a filer who has filed the long form in years past, if there have been few or no changes in the information disclosed by that person in a complete financial disclosure report filed within the past five years. The report must be accompanied by a short sworn statement on a form provided by the City, and state that there have been no material changes in that information, or include a list of the few material changes that have occurred, and include the date of the last filing of the long form.

#### **IV. Conclusion**

A member of a City commission may use the short form financial disclosure report instead of the long form report, if there have been no or few material changes since the date of their last filed long form report. The short form must be submitted with a sworn statement by the filer, detailing any changes that have occurred, and the date the last long form report was filed.