

# SB0211



## 104TH GENERAL ASSEMBLY

### State of Illinois

2025 and 2026

SB0211

Introduced 1/22/2025, by Sen. Chapin Rose

#### SYNOPSIS AS INTRODUCED:

5 ILCS 420/4A-102  
5 ILCS 420/4A-103

from Ch. 127, par. 604A-102  
from Ch. 127, par. 604A-103

Amends the Illinois Governmental Ethics Act. Provides that a filer's statement of economic interests shall include the name of each spouse, sibling, child, or parent of the filer who is an employee, contractor, or office holder in the same unit of local government as the filer of the statement and the title of the position or nature of the contractual services provided to the unit of local government.

LRB104 03746 BDA 13770 b

A BILL FOR

1 AN ACT concerning government.

2 **Be it enacted by the People of the State of Illinois,**  
3 **represented in the General Assembly:**

4 Section 5. The Illinois Governmental Ethics Act is amended  
5 by changing Sections 4A-102 and 4A-103 as follows:

6 (5 ILCS 420/4A-102) (from Ch. 127, par. 604A-102)

7 Sec. 4A-102. The statement of economic interests required  
8 by this Article shall include the economic interests of the  
9 person making the statement as provided in this Section.

10 (a) The interest (if constructively controlled by the  
11 person making the statement) of a spouse or any other party,  
12 shall be considered to be the same as the interest of the  
13 person making the statement. Campaign receipts shall not be  
14 included in this statement. The following interests shall be  
15 listed by all persons required to file:

16 (1) each asset that has a value of more than \$10,000 as  
17 of the end of the preceding calendar year and is: (i) held  
18 in the filer's name, (ii) held jointly by the filer with  
19 his or her spouse, or (iii) held jointly by the filer with  
20 his or her minor child or children. For a beneficial  
21 interest in a trust, the value is based on the total value  
22 of the assets either subject to the beneficial interest,  
23 or from which income is to be derived for the benefit of

1 the beneficial interest, regardless of whether any  
2 distributions have been made for the benefit of the  
3 beneficial interest;

4 (2) excluding the income from the position that  
5 requires the filing of a statement of economic interests  
6 under this Act, each source of income in excess of \$7,500  
7 during the preceding calendar year (as required to be  
8 reported on the filer's federal income tax return covering  
9 the preceding calendar year) for the filer and his or her  
10 spouse and, if the sale or transfer of an asset produced  
11 more than \$7,500 in capital gains during the preceding  
12 calendar year, the transaction date on which that asset  
13 was sold or transferred;

14 (3) each creditor of a debt in excess of \$10,000 that,  
15 during the preceding calendar year, was: (i) owed by the  
16 filer, (ii) owed jointly by the filer with his or her  
17 spouse or (iii) owed jointly by the filer with his or her  
18 minor child or children;

19 (4) the name of each unit of government of which the  
20 filer or his or her spouse was an employee, contractor, or  
21 office holder during the preceding calendar year other  
22 than the unit or units of government in relation to which  
23 the person is required to file and the title of the  
24 position or nature of the contractual services;

25 (5) each person known to the filer to be registered as  
26 a lobbyist with any unit of government in the State of

1 Illinois: (i) with whom the filer maintains an economic  
2 relationship, or (ii) who is a member of the filer's  
3 family;

4 (6) each source and type of gift or gifts, or  
5 honorarium or honoraria, valued singly or in the aggregate  
6 in excess of \$500 that was received during the preceding  
7 calendar year, excluding any gift or gifts from a member  
8 of the filer's family that was not known to the filer to be  
9 registered as a lobbyist with any unit of government in  
10 the State of Illinois; ~~and~~

11 (7) the name of any spouse or immediate family member  
12 living with such person employed by a public utility in  
13 this State and the name of the public utility that employs  
14 such person; ~~and-~~

15 (8) the name of each spouse, sibling, child, or parent  
16 who is an employee, contractor, or office holder in the  
17 same unit of local government as the filer of this  
18 statement and the title of the individual's position or  
19 the nature of the contractual services the individual  
20 provided to the unit of local government.

21 For the purposes of this Section, the unit of local  
22 government in relation to which a person is required to file  
23 under item (e) of Section 4A-101.5 shall be the unit of local  
24 government that contributes to the pension fund of which such  
25 person is a member of the board.

26 (b) Beginning December 1, 2025, and for every 5 years

1 thereafter, the Secretary of State shall adjust the amounts  
2 specified under this Section that prompt disclosure under this  
3 Act for purposes of inflation as determined by the Consumer  
4 Price Index for All Urban Consumers as issued by the United  
5 States Department of Labor and rounded to the nearest \$100.  
6 The Secretary shall publish this information on the official  
7 website of the Secretary of State, and make changes to the  
8 statement of economic interests form to be completed for the  
9 following year.

10 (c) The Secretary of State shall develop and make publicly  
11 available on his or her website written guidance relating to  
12 the completion and filing of the statement of economic  
13 interests upon which a filer may reasonably and in good faith  
14 rely.

15 (Source: P.A. 101-221, eff. 8-9-19; 102-662, eff. 9-15-21;  
16 102-664, eff. 1-1-22; 102-813, eff. 5-13-22.)

17 (5 ILCS 420/4A-103) (from Ch. 127, par. 604A-103)

18 Sec. 4A-103. The statement of economic interests required  
19 by this Article to be filed with the Secretary of State or  
20 county clerk shall be verified, dated, and signed by the  
21 person making the statement and shall contain substantially  
22 the following:

23 STATEMENT OF ECONOMIC INTERESTS

1 INSTRUCTIONS:

2 You may find the following documents helpful to you in  
3 completing this form:

4 (1) federal income tax returns, including any related  
5 schedules, attachments, and forms; and

6 (2) investment and brokerage statements.

7 To complete this form, you do not need to disclose  
8 specific amounts or values or report interests relating either  
9 to political committees registered with the Illinois State  
10 Board of Elections or to political committees, principal  
11 campaign committees, or authorized committees registered with  
12 the Federal Election Commission.

13 The information you disclose will be available to the  
14 public.

15 You must answer all 6 questions. Certain questions will  
16 ask you to report any applicable assets or debts held in, or  
17 payable to, your name; held jointly by, or payable to, you with  
18 your spouse; or held jointly by, or payable to, you with your  
19 minor child. If you have any concerns about whether an  
20 interest should be reported, please consult your department's  
21 ethics officer, if applicable.

22 Please ensure that the information you provide is complete  
23 and accurate. If you need more space than the form allows,  
24 please attach additional pages for your response. If you are  
25 subject to the State Officials and Employees Ethics Act, your  
26 ethics officer must review your statement of economic

1 interests before you file it. Failure to complete the  
 2 statement in good faith and within the prescribed deadline may  
 3 subject you to fines, imprisonment, or both.

4 BASIC INFORMATION:

5 Name:.....

6 Job title: .....

7 Office, department, or agency that requires you to file this  
 8 form:.....

9 Other offices, departments, or agencies that require you to  
 10 file a Statement of Economic Interests form: .....

11 Full mailing address:.....

12 Preferred e-mail address (optional): .....

13 QUESTIONS:

14 1. If you have any single asset that was worth more than  
 15 \$10,000 as of the end of the preceding calendar year and is  
 16 held in, or payable to, your name, held jointly by, or payable  
 17 to, you with your spouse, or held jointly by, or payable to,  
 18 you with your minor child, list such assets below. In the case  
 19 of investment real estate, list the city and state where the  
 20 investment real estate is located. If you do not have any such  
 21 assets, list "none" below.

22 .....

23 .....

24 .....

1 .....

2 .....

3 2. Excluding the position for which you are required to  
4 file this form, list the source of any income in excess of  
5 \$7,500 required to be reported during the preceding calendar  
6 year. If you sold an asset that produced more than \$7,500 in  
7 capital gains in the preceding calendar year, list the name of  
8 the asset and the transaction date on which the sale or  
9 transfer took place. If you had no such sources of income or  
10 assets, list "none" below.

11 Source of Income / Name of Date Sold (if applicable)  
12 Asset

13 .....

14 .....

15 .....

16 3. Excluding debts incurred on terms available to the  
17 general public, such as mortgages, student loans, and credit  
18 card debts, if you owed any single debt in the preceding  
19 calendar year exceeding \$10,000, list the creditor of the debt  
20 below. If you had no such debts, list "none" below.

21 List the creditor for all applicable debts owed by you,  
22 owed jointly by you with your spouse, or owed jointly by you  
23 with your minor child. In addition to the types of debts listed  
24 above, you do not need to report any debts to or from financial  
25 institutions or government agencies, such as debts secured by



1 automobiles, household furniture or appliances, as long as the  
 2 debt was made on terms available to the general public, debts  
 3 to members of your family, or debts to or from a political  
 4 committee registered with the Illinois State Board of  
 5 Elections or any political committee, principal campaign  
 6 committee, or authorized committee registered with the Federal  
 7 Election Commission.

8 .....  
 9 .....  
 10 .....  
 11 .....

12 4. List the name of each unit of government of which you or  
 13 your spouse were an employee, contractor, or office holder  
 14 during the preceding calendar year other than the unit or  
 15 units of government in relation to which the person is  
 16 required to file and the title of the position or nature of the  
 17 contractual services.

18	Name of Unit of Government	Title or Nature of Services
19	.....	.....
20	.....	.....
21	.....	.....

22 5. If you maintain an economic relationship with a  
 23 lobbyist or if a member of your family is known to you to be a  
 24 lobbyist registered with any unit of government in the State  
 25 of Illinois, list the name of the lobbyist below and identify

1 the nature of your relationship with the lobbyist. If you do  
 2 not have an economic relationship with a lobbyist or a family  
 3 member known to you to be a lobbyist registered with any unit  
 4 of government in the State of Illinois, list "none" below.

5	Name of Lobbyist	Relationship to Filer
6	.....	.....
7	.....	.....
8	.....	.....

9 6. List the name of each person, organization, or entity  
 10 that was the source of a gift or gifts, or honorarium or  
 11 honoraria, valued singly or in the aggregate in excess of \$500  
 12 received during the preceding calendar year and the type of  
 13 gift or gifts, or honorarium or honoraria, excluding any gift  
 14 or gifts from a member of your family that was not known to be  
 15 a lobbyist registered with any unit of government in the State  
 16 of Illinois. If you had no such gifts, list "none" below.

17 .....

18 .....

19 .....

20 7. List the name of any spouse or immediate family member  
 21 living with the person making this statement employed by a  
 22 public utility in this State and the name of the public utility  
 23 that employs the relative.

24	Name and Relation	Public Utility
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1 .....  
 2 .....  
 3 .....

4 8. List the name of each spouse, sibling, child, or parent  
 5 who is an employee, contractor, or office holder in the same  
 6 unit of local government as the filer of this statement and the  
 7 title of the individual's position or the nature of the  
 8 contractual services the individual provided to the unit of  
 9 local government.

<u>Name and Relation</u>	<u>Position or Nature of Service</u>
11 ..... .....	..... .....
12 ..... .....	..... .....
13 ..... .....	..... .....

14 VERIFICATION:

15 "I declare that this statement of economic interests  
 16 (including any attachments) has been examined by me and to the  
 17 best of my knowledge and belief is a true, correct and complete  
 18 statement of my economic interests as required by the Illinois  
 19 Governmental Ethics Act. I understand that the penalty for  
 20 willfully filing a false or incomplete statement is a fine not  
 21 to exceed \$2,500 or imprisonment in a penal institution other  
 22 than the penitentiary not to exceed one year, or both fine and  
 23 imprisonment."

24 Printed Name of Filer: .....

1 Date:.....

2 Signature: .....

3 If this statement of economic interests requires ethics  
4 officer review prior to filing, the applicable ethics officer  
5 must complete the following:

6 CERTIFICATION OF ETHICS OFFICER REVIEW:

7 "In accordance with law, as Ethics Officer, I reviewed  
8 this statement of economic interests prior to its filing."

9 Printed Name of Ethics Officer: .....

10 Date:.....

11 Signature: .....

12 Preferred e-mail address (optional): .....

13 (Source: P.A. 102-662, eff. 9-15-21; 102-664, eff. 1-1-22.)