

March 31, 2021

Thomas Bulger
17th Street N.W.
Washington, DC 20036

Dear Mr. Bulger,

Congratulations on being nominated for reappointment to the Board of Directors of the Washington Metropolitan Area Transit Authority (WMATA Board). As you know, the reappointment is subject to approval by the Council. The Committee of the Whole has scheduled a public hearing on your nomination for **Wednesday, April 7, 2021 at 9:30 a.m. via Zoom video conference**. Enclosed is a copy of the hearing notice. It is standard for the Council to submit questions to nominees. I request your response to the following questions no later than close of business Tuesday, April 6, 2021.

1. Please provide a copy of the Financial Disclosure Statement you filed with the Office of Campaign Finance or the Board of Ethics and Government Accountability. If you have not filed a Financial Disclosure Statement, please provide answers to questions 2-8 in lieu of that statement. **I will send my WMATA ethics submittal.**
2. Please provide the name of each business entity transacting any business with the District Government in which you have a beneficial interest valued in excess of \$5,000, including publicly traded stock. **None.**
3. Please provide the name of each business entity transacting any business (including consulting) with the District Government from which you or your immediate family have received (or are receiving) income for services rendered in excess of \$1,000 during the past two years. **None.**
4. Please provide the name of each business entity transacting business with the District Government in which you or any member of your immediate family serves as an officer, director, partner, or agent. Also list the position(s) held, a brief description of the entity, and any other pertinent details. **None.**
5. Please provide the name of any lender and the amount of liability for each outstanding liability borrowed by you or any member of your immediate family in excess of \$5,000. Do not include loans from a federal or state insured or regulated financial institution, or from any business enterprise regularly engaged in the business of providing revolving credit or installment accounts. **None.**
6. Please list the location of all real property located in the District of Columbia in which you have an interest with a fair market value in excess of \$5,000. **6000 Nebraska Ave. NW**
7. Please list all professional and occupational licenses held by you. **None**

8. Please list any professional organizations of which you are currently a member. **University Club of Washington DC**
9. Please list all boards and commissions connected with the District government on which you are or have been a member, and include the term of service for each. **None**
10. Please list any other boards (e.g. Boards of Directors of a non-profit) on which you are a member. **None**
11. Do you have any outstanding liability for taxes, fees, or other payments to the District, federal, or other state or local governments, either contested or uncontested? If so, please provide documentation of attempts to pay the amount owed or to resolve the disputed claim. **No**
12. Do you or any member of your immediate family have any interest, financial or otherwise, that may directly or indirectly pose a conflict of interest for you in performance of your duties as a member of the WMATA Board? **No**
13. Please describe any local political activity (i.e. the District of Columbia local elections or campaigns) that you have engaged in over the past five years, including any campaign contributions to a local candidate or political action committee. **None**
14. Are you registered with any local, state, or federal government to lobby? If so, list the jurisdiction(s) in which you are registered. **Congress Senate and House**
15. Do you understand how much time will be required of you to serve on the WMATA Board and do you commit to spend that time? **Yes**
16. Why have you agreed to continue to serve, and how do you plan to help the WMATA Board fulfill its role and mission during your time on the WMATA Board? Include in your answer what you believe are the most important priorities for the WMATA Board. **As an Alternate for the last ten years I have supported the city's principal board members. WMATA's most important priority is to regain rail ridership.**
17. Please discuss any past and present experiences not already mentioned that you believe are relevant to support your appointment as a member of the WMATA Board.

At the April 7th hearing, you will be asked to make an opening statement indicating your interest in continuing to serve as a member of the WMATA Board. The testimony of persons interested in supporting your nomination is helpful but not necessary. Interested parties may visit <http://www.ChairmanMendelson.com/testify> to register to testify or, alternatively, may submit written comments to the Committee regarding your nomination via letter mail or e-mail (cow@dccouncil.us).

If you have any questions please do not hesitate to call me or Evan Cash on my staff at (202) 724-7004.

Sincerely,

Phil Mendelson
Chairman

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

Board of Directors Disclosure Form

General Instructions

- Step 1: Read the definitions on the following page.
- Step 2: Place your name at the top of every page.
- Step 3: Complete Parts I-IV. Do not leave a part blank. **Write "N/A" in any part for which you have nothing to report.** If you have already reported an interest in a particular entity in a response to a previous part, you may write "see response to part _."
- If there is insufficient space to completely answer any part, please use the provided continuation page.
- Step 4: Sign the form and date it in the space provided in Part V.
- Step 5: Submit a signed copy of the completed form electronically or in hard copy to the Board Corporate Secretary by April 30.
- Step 6: In accordance with WMATA Board Code of Ethics, Article X.B, there is a continuing obligation to disclose any changes to the information reported in a Member's Disclosure Form within 10 calendar days of the change.

***PLEASE SUBMIT COMPLETED FORM TO THE
BOARD CORPORATE SECRETARY BY APRIL 30.***

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

Board of Directors Disclosure Form

Reporting Individual's Name:

Definitions

Household Member: A spouse, domestic partner, any dependent child within the meaning of Section 152 of the Internal Revenue Code living in the Member's household, and any relative over whose financial affairs the Board Member has substantial legal or actual control.

Business: A sole proprietorship, corporation, partnership, company, joint venture, association, joint stock company, or any other form of entity recognized by law that is engaged in trade, commerce, or the transaction of business, and any parent of a business entity. A "parent of a business entity" owns or controls more than fifty percent of that entity (i.e. by value or voting power).

Property: Real property, including land, together with any structures, improvements, and any rights or interests in land and/or improvements.

Interested Party: Any Business that has or is seeking a contract or agreement with WMATA, has interests that can be directly affected by decisions or actions of WMATA, or may realize a reasonably foreseeable benefit or detriment as a result of an action or decision by the Board.

Part I – Household Members

Identify all Household Members for whom you are reporting and include the nature of the relationship.

Name of Household Member	Relationship

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WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

Board of Directors Disclosure Form

Reporting Individual's Name:

Part II – Employment, Fiduciary Positions and Personal Representation

A. Employment. Report any paid employment or self-employed positions (whether full, part-time, or temporary, regardless of duration) held by you or a Household Member, other than government employment.

Name and Address of Employer	Position Held

B. Interested Parties from which Employers Receive Revenue. For each employer reported in Part II.A, report any Interested Party doing business with that employer (e.g., a client or vendor of the employer) from which the employer receives revenues of at least \$10,000 or 3% of the employer's gross income, whichever is greater.

Employer	Name, Address of Client	Revenue: Yes/No ¹

¹Confirm that the employer receives revenues from an Interested Party of at least \$10,000 or 3% of the employer's gross income, whichever is greater.

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Board of Directors Disclosure Form

Reporting Individual's Name:

C. Fiduciary Positions. Report any position held by you or a Household Member as a director, officer, general partner, trustee, or other fiduciary of a Business, whether or not financially remunerated. Include fiduciary positions in nonprofit, labor, governmental and educational organizations. Religious, social, fraternal, or political organizations need not be disclosed.

Name and Address of Business	Position Held

D. Personal Representation. Report any Business or person that is an Interested Party for which you or a Household member provides services (e.g., legal, audit, accounting, financial or consulting services), regardless of the specific subject matter of the services or amount of compensation. Exclude employers reported in Part II.A.

Name and Address of Business or Person	Service Provided

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Board of Directors Disclosure Form

Reporting Individual's Name:

Part III – Substantial Interests or Duties

Once you have listed a Business (indicating that you or a Household Member has a Substantial Financial Interest or Duty in it) in one subpart, you need not repeat it in subsequent subparts.

Interests Not Required to Be Reported. When identifying your interests in this Part, you do not need to report any interest that you have in or that arises from any of the following:

- Checking or savings accounts, money market accounts, other demand deposits
- Certificates of deposit, diversified mutual funds, and government bonds
- Government employment
- Pension plans, employee benefit plans, trusts, estates, and other similar funds, plans, or entities administered by an independent party without participation by you or a Household Member in the selection or designation of the financial interests to be held by the fund, plan, or entity.
- Any debt incurred in the ordinary course of business on usual commercial terms, such as:
 - Mortgage secured by a personal residence;
 - Loan secured by a personal motor vehicle, household furniture, or appliances;
 - Personal revolving line of credit or capital contribution loan; or
 - Debit, credit, or other revolving charge account

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WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

Board of Directors Disclosure Form

Reporting Individual's Name:

A. Ownership Interests in Businesses or Properties. Report for yourself and all Household Members any reportable ownership interests in Businesses or Properties (other than your personal residence) held at the time of filing this form that:

- Exceed 3% of the total equity of the Business,
- Have a fair market value greater than \$15,000,
- Yield more than \$1,000 in annual income, or
- Is a Business that receives revenues from an Interested Party of at least \$10,000 or 3% of its gross income.

Name and Address of Business or Property	Type of Interest Held ²

²For instance, stocks, bonds, partnership interest, fee or leasehold interest in Property.

B. Income from Businesses or Properties. Report for yourself and all Household Members any source of income from a Business or Property that exceeds, or may be reasonably expected to exceed, \$1,000 per year. Also report a prospective source of income, such as from a job offer received by you or a Household Member.

Name and Address of Business or Property	Income Description ³

³For instance, salary, wages, interest, dividends, rent.

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Board of Directors Disclosure Form

Reporting Individual's Name:

C. Pledges or Sureties. Report for yourself and all Household Members any pledge or surety on behalf of a Business that may give rise to a liability that exceeds the lesser of:

- 3% of the asset value of the Business, or
- \$1,000.

Name and Address of Business	Type of Pledge or Surety ⁴

⁴For instance, a personal guaranty.

D. Loans or Debts. Report for yourself and all Household Members any personal indebtedness in the form of loans or debts in excess of \$1,000 that are owed to a Business.

Name and Address of Business	Type of Debt

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Board of Directors Disclosure Form

Reporting Individual's Name:

E. Substantial Ownership or Control. Report any Business of which you, a Household Member, or you and a Household Member in combination, own or control more than 50 percent (by value or voting power).

Name and Address of Business	Ownership or Control

Part IV – Other Interests

Use the space below to describe any other circumstance of which you are aware that would compromise your ability to perform your duties as a Board member fairly and objectively.

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WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
Board of Directors Disclosure Form

Part V – Board Member Certification and Signature

I CERTIFY that the statements I have made on this form and on any continuation pages attached to this form are true, complete, and correct to the best of my knowledge. I acknowledge my continuing obligation to report any changes in the above information to the Board Corporate Secretary in writing within 10 calendar days of such change. I understand and agree to comply with the Code of Ethics for Members of the WMATA Board of Directors, including my fiduciary obligations.

Signature	Date
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Received by Board Corporate Secretary

Signature	Date
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Part VI - Review by Ethics Officer

I have reviewed this statement and any attachments and have advised the member regarding obligations under the Board Code of Ethics arising from all reported information.

Signature: _____

Date: _____

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BOARD CORPORATE SECRETARY BY APRIL 30.***

