

NEBRASKA
ACCOUNTABILITY AND
DISCLOSURE COMMISSION
1225 L St., Suite 400
P.O. Box 95086
Lincoln, NE 68509
(402) 471-2522
<https://nadc.nebraska.gov>

BEFORE COMPLETING
READ FILING REQUIREMENTS

STATEMENT OF FINANCIAL INTERESTS

Calendar Year 2023

NADC FORM C-1

POSTMARK
DATE

email 2/13/24

OFFICE USE ONLY

Amended

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- This statement must cover all financial interests for the entire "calendar year" as noted above and not just as of year-end.
- Candidates for designated offices and holders of designated offices and positions must file this statement with the Commission. See Sections 1A and 1B of the instructions.
- Candidates (including incumbents) subject to this filing requirement must file this statement in order to have their names appear on the ballot. (See Instructions).
- Designated officeholders and holders of designated positions must file this statement with the Commission annually.
- Dollar values need not be report for any item, except Item 11.
- Persons who fail to file as required are subject to a civil penalty of up to \$5,000.

ITEM 1 YOUR NAME, ADDRESS AND PHONE NUMBER

Name Morgan Paul F Telephone No. (402)871-7775
LAST FIRST MIDDLE
E-mail Pmorgan@pjmorganconsulting.com
Address 11124 Pierce Plaza Omaha NE 68144
STREET ADDRESS OR RURAL ROUTE CITY STATE ZIP CODE

ITEM 2 OCCASION FOR FILING (Check Appropriate Box)

- ☐ A candidate for elective office
☒ Annual officeholder's or state employee's report ☐ Newly appointed to office or position

ITEM 3 OFFICE HELD & TERM OF OFFICE (Incumbent elected/appointed officials and state employees. See 1B of instructions)

List the office or position you currently hold which requires this filing.

Office or Position: Douglas County Commissioner District 4 Term: 01/2023 01/2027
BEGINS ENDS

Name of City, County, District, or State Agency: Douglas County Commissioner District 4 City of Omaha

ITEM 4 OFFICE SOUGHT (Candidates only. See 1A of instructions)

List the office sought which requires this filing.

Office: _____

Name of City, County, District, or State Office: _____

ITEM 5 PERIOD COVERED BY THIS STATEMENT

This statement must cover all financial interests for the entire "preceding calendar year" and not just as of year-end.

This statement covers the preceding calendar year January 1 through December 31, 2023

ITEM 6 SOURCES OF INCOME OF OVER \$1,000

Income includes money or any other form of recompense constituting income under the Internal Revenue Code. (See definitions)

Name and address of any source* (including an individual, business, body of government, political subdivision or body corporate) from which income of over \$1,000 was received.

List the nature of the source's business and the nature of the services you rendered or the circumstances under which income was received. NOTE: Do not list the amount of the income.

Also include your Government position if you were paid more than \$1,000.

- | | |
|--|--|
| 1.) Douglas County Board of Commissioners
1819 Farnam Street
Omaha, NE 68183 | 1a.) Douglas County Board of Commissioners District 4 income |
| 2.) City of Omaha
1819 Farnam Street
Omaha, NE 68183 | 2a.) City of Omaha former Mayor pension income |
| 3.) | 3a.) |
| 4.) | 4a.) |

*NOTE: IF INCOME RESULTED FROM EMPLOYMENT BY, OPERATION OF OR PARTICIPATION IN A PROPRIETORSHIP, PARTNERSHIP, CORPORATION OR OTHER PERSON, LIST THE SAME AS THE SOURCE OF INCOME, BUT NOT THE PATRONS, CUSTOMERS, PATIENTS, OR CLIENTS THEREOF.

ITEM 7 BUSINESSES WITH WHICH YOU ARE ASSOCIATED Including Non Profits (See definitions)

Name and address of all businesses, organizations, or associations (profit and non-profit) with which you held a position of officer, director, limited liability company member, partner, or stockholder and any entity in which you held a position of trustee. Such reporting is required based on the position held, not on whether income was received. You need not report business associations which are otherwise listed under Item 6.

Name and Address of Business or Organization.

Nature of Association

If you have nothing to report, write NONE

- | | |
|--|--------------|
| 1.) PJ Morgan Consulting Services Inc
7820 Wakeley Plaza
Omaha, NE 68114 | 1a.) Owner |
| 2.) TCB Real Estate
7820 Wakeley Plaza
Omaha, NE 68114 | 2a.) Owner |
| 3.) AMM Investments
7820 Wakeley Plaza
Omaha, NE 68114 | 3a.) Partner |
| 4.) Underwood Apartments
7820 Wakeley Plaza
Omaha, NE 68114 | 4a.) Owner |
| 5.) Dundee Three LLC
7820 Wakeley Plaza
Omaha, NE 68114 | 5a.) Partner |
| 6.) Leavenworth6 LLC
7820 Wakeley Plaza
Omaha, NE 68114 | 6a.) Partner |
| 7.) AFA1
7820 Wakeley Plaza
Omaha, NE 68114 | 7a.) Owner |

List all real property in Nebraska in your name or in which you have a direct ownership interest. The description required must be sufficient to identify the location of the property. Exceptions: You need not report real property owned by a business listed in Item 6 or 7, your personal residence or real property valued at less than \$1,000. Personal residence refers to your principal dwelling-house and adjacent land used for house-hold purposes, such as lawns and gardens.

ITEM 9	OTHER FINANCIAL INTERESTS AND PROPERTY HELD DURING THE PERIOD OF THIS STATEMENT WHICH EXCEEDED A FAIR MARKET VALUE OF \$1,000 AT ANY TIME DURING THE REPORTING PERIOD
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(a) List the names and addresses of the institutions in which you had checking and savings accounts	
Financial Institution	Address
If you have nothing to report, write NONE	
US Bank	8800 W Center Rd Omaha, NE 68124
First Savings Bank	3540 S 84th St, Omaha, NE 68124
Westgate Bank	PO Box 82603 Lincol, NE 68501

If you have nothing to report, write NONE

American Funds, Lance Jones (402) 934-5959

(c) Describe other property owned or held for the production of income not otherwise disclosed in Items 6, 7, 8 or 9(a)(b). Include leaseholds and other interests in real estate, promissory notes and other obligations owed to you, beneficial interests in trusts and estates, cash value life insurance, IRAs, deferred income and retirement plans. Exception: Do not include accounts receivable, inventory, fixtures and equipment owned or used by a business listed in Items 6 & 7 or household goods, personal automobiles and other tangible personal property unless such property was held primarily for sale or exchange.

If you have nothing to report, write NONE

Manuel life \$25,000

307 S 92nd Street Omaha, NE Promisary Note \$480,938.98

534 S 87th Circle Omaha, NE Promisary Note \$276,677.85

5038 S 178th Omaha, NE Promisary Note \$303,742.59

6113 Havelock Lincoln, NE Promisary Note \$573,451.68

ITEM 10

CREDITORS TO WHOM \$1,000 OR MORE WAS OWED OR GUARANTEED BY YOU OR A MEMBER OF YOUR IMMEDIATE FAMILY.

Exception: Loans from a relative and land contracts which have been recorded with the County Clerk or Register of Deeds need not be reported. Accounts payable, debts arising out of retail installment transactions or loans made by a financial institution in the ordinary course of business need not be reported.

Name

Address

If you have nothing to report, write NONE

NONE

ITEM 11

SOURCES OF GIFTS OF A VALUE OF MORE THAN \$100 RECEIVED EXCEPT GIFTS FROM RELATIVES. (See definitions) If you have nothing to report, write NONE

Name and address of Donor

Occupation or nature of
business of Donor

Value of Gift
(See Key Below)

Description of Gift and
Circumstances or
Occasion for Gift

If you have nothing to report, write NONE

NONE

Choose Value:

Choose Value:

Choose Value:

Choose Value:

Choose Value:

Choose Value:

Choose Value:

Choose Value:

The monetary value of each gift shall be categorized based on the good faith estimate of the filer. For each reported gift insert in the Value column the letter which corresponds to the value category of the gift. The value categories are:

A) \$100.01 to \$200; B) \$200.01 to \$500; C) \$500.01 to \$1,000; D) \$1,000.01 or more.

ITEM 12 **SUPPLEMENTAL INFORMATION** (please attach any supplemental info and note below to see attached)

ITEM 13 **SIGNATURE OF FILER AND DATE**

I hereby state that I have used all reasonable diligence in the preparation of this Statement and that to the best of my knowledge it is true and complete.



2/9/24

(Signature of Filer)

(Date)

Criminal Penalties: Any person who files a statement knowing that information is false shall be guilty of a Class IV Felony, See §49-14,134, Nebraska Revised Statutes.