

Attachment A to MTAB Conflict of Interest Policy
Market Transformation Advisory Committee (MTAB) Disclosure Form
 (Note: this will be provided in an electronic form)

*A **conflict of interest** shall mean any financial interest or contractual relationship that may impair the ability of an MTAB member to be impartial and unbiased in fulfilling the MTAB member's duties identified in the MTAB charter.*

This disclosure form will be filled out and delivered to CalMTA to be posted on its website:

- a. Prior to joining the MTAB, annually, and upon the conclusion of the member's service, and
- b. When an MTAB member becomes aware of an actual or potential conflict of interest or the appearance of an actual or potential conflict of interest related to an MTAB topic that has not been previously reported per item (a) above.

1. Name and Title Jillian Rich, board member
2. Email Jillian.Rich@smud.org
3. Employer SMUD
4. Do you, your immediate family member, your employer, or a parent, affiliate, or subsidiary of your employer currently provide services to CalMTA?

Yes No

If yes, please describe. _____

5. Do you, your immediate family member, your employer, or a parent, affiliate, or subsidiary of your employer currently have, or are planning to have, a financial relationship with Resource Innovations, West Monroe (formerly 2050 Partners), Brio, Unrooz Solutions, or Ortiz Group?

Yes No

If yes, please describe the nature and duration of those financial relationships.

My department at SMUD contracts with Resource Innovations

6. Are you aware of other circumstances that could be an actual or perceived conflict of interest?

Yes No

If yes, please describe. No perceived conflict

I attest that the above material is accurate. If I discover that I might have a perceived or actual conflict in addition to those listed above, I will immediately inform the appropriate individuals.

Name: Jillian Rich

Signature: *Jillian Rich*
Jillian Rich (May 18, 2026 08:59:57 PDT)

Date: May 18, 2026






MTAB COI Disclosure Form

Final Audit Report

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