

Statement of Financial Interests for 2023



CONTACT INFORMATION

Last Name:

Rosa

First Name and Middle initial:

Marta T

Work Phone Number:

(781) 808-8372

Other Phone:

Redacted

Work Email:

mrosa5@rcc.mass.edu

Other Email:

Redacted

Primary Residence Address:

Redacted

Contact mailing address

Redacted

You indicated that you did have a spouse residing in your household during 2023.

You indicated that you had no dependent child(ren) residing in your household at any time during 2023.

Candidacy and Public Service

1. If you are a candidate for public office, please indicate the public office you are seeking.

Filer reported none.

2. Identify the position you now hold, or have held, which requires you to file a Statement of Financial Interests and provide the required information for that position. If you held more than one public position which requires you to file, identify each position.

| Agency Name | Address | Position | Date | Amount of Income |
|---------------------------|---|---|-------------------------|-------------------|
| Roxbury Community College | 1234 Columbus Ave., Roxbury Crossing, MA, 02120, US | Interim EVP & Special Assistant to President | 02/07/2022 - 02/07/2023 | \$100,001 or more |
| Roxbury Community College | 1234 Columbus Ave., Roxbury Crossing, MA, 02120, US | Interim EVP & Special Assistant to President | 02/07/2022 | \$100,001 or more |
| Roxbury Community College | 1234 Columbus Avenue, Roxbury Crossing, MA, 02120, US | Interim Executive Vice President & Special Assistant to the President | 02/07/2022 | \$100,001 or more |

3. Other than the position(s) identified in Question 2, identify every public position you held, and every public agency to which you provided services, at any time during 2023, whether compensated or not, and whether full- or part-time.

Filer reported none.

4. Identify every public position your spouse and/or any dependent child(ren) residing in your household held, and every public agency to which your spouse and/or any dependent child(ren) residing in your household provided services, at any time during 2023, whether compensated or not, and whether full- or part-time.

| Public Agency | Public Agency Name | Address | Position | Consultant / Contractor? | Services Provided |
|---------------|----------------------------------|---|------------------------|--------------------------|-------------------|
| State | Commonwealth of MA | 24 Beacon St, Boston, MA, 02133, US | Legislative Postmaster | N/A | |
| State | Commonwealth of Mass- Statehouse | 24 Beacon St, Boston, MA, 02133, US | Legislative Postmaster | N/A | |
| State | Commonwealth of Mass Statehouse | 25 Beacon St, Boston, MA, 02108, US | Legislative Postmaster | N/A | |

Private Employment and Leaves of Absence

5. Identify every Business for which you worked as an employee, manager, consultant, or independent contractor at any time during 2023, whether compensated or not, and whether full- or part-time, and provide the required information for each.

| Business Name | Self-employed | Address | Position | Income |
|-----------------------------|-------------------------------------|--|------------|---------------------|
| Worcester State University | <input checked="" type="checkbox"/> | 486 Chandler St, Worcester, MA, 01602, US | Consultant | \$5,001 to 10,000 |
| Eos Foundation | <input checked="" type="checkbox"/> | 537 Main St., Harwich Port, MA, 02646, US | Consultant | \$60,001 to 100,000 |
| JJS Advisong | <input checked="" type="checkbox"/> | 111 Perkins St. Unit 043, Jamaica Plain, MA, 02130, US | Consultant | \$40,001 to 60,000 |
| University of Massachusetts | <input checked="" type="checkbox"/> | 333 South St., Shrewsbury, MA, 01545, US | Consultant | \$1,001 to 5,000 |
| Hyde Square Task Force | <input checked="" type="checkbox"/> | 30 Sunnyside St. , Jamaica Plain, MA, 02130, US | Consultant | \$5,001 to 10,000 |
| Northeast Arc Inc | N/A | 300 Rosewood Dr, Danvers, MA, 01923, US | Employee | \$20,001 to 40,000 |
| Worcester State University | <input checked="" type="checkbox"/> | 486 Chandler St, Worcester, MA, 01602, US | Consultant | \$1,001 to 5,000 |
| Eos Foundation | <input checked="" type="checkbox"/> | 537 Main St. #12, Harwich Port, MA, 02646, US | Consultant | \$60,001 to 100,000 |
| Tempus Unlimited | N/A | 600 Technology Center Drive , Stoughton, MA, 02072, US | Employee | \$20,001 to 40,000 |
| University of Mass Boston | <input checked="" type="checkbox"/> | 100 Morrissey Blvd. , Boston, MA, 02125, US | Consultant | \$1,001 to 5,000 |

| | | | | |
|----------------------------------|-------------------------------------|--|------------|------------------------|
| JJS Advising | <input checked="" type="checkbox"/> | 111 Perkins St. Unit 043 , Jamaica Plain , MA, 02130, US | Consultant | \$20,001 to 40,000 |
| Terra Corps | <input checked="" type="checkbox"/> | 116 John St. Suite 405, Lowell , MA, 01852, US | Consultant | Less than \$1,001 |
| Worcester State University | <input checked="" type="checkbox"/> | 486 Chandler St, Worcester, MA, 01602, US | Consultant | \$5,001 to 10,000 |
| UMass Boston | <input checked="" type="checkbox"/> | 100 Morrissey Blvd. , Boston, MA, 02125, US | Consultant | \$1,001 to 5,000 |
| Eos Foundation | <input checked="" type="checkbox"/> | 537 Main St., Harwich Port, , MA, 02646, US | Consultant | \$60,001 to 100,000 |
| Tempus Unlimited | N/A | 600 Technology Center Drive , Stoughton, MA, 02072, US | Employee | \$20,001 to 40,000 |
| Terra Corps | <input checked="" type="checkbox"/> | 116 John St. Suite 405, Lowell, MA, 01852, US | Consultant | \$1,001 to 5,000 |

6. Identify any Business from which you were on a leave of absence at any time during 2023, and provide its address.

Filer reported none.

7. Identify every Business for which your spouse and/or any dependent child(ren) residing in your household worked as an employee, manager, consultant, or independent contractor at any time during 2023, whether compensated or not, and whether full- or part-time, and provide the required information for each.

| Business Name | Self-employed | Address | Position |
|----------------|-------------------------------------|--|------------------------|
| United Brokers | N/A | 283 Cushman Ave, Revere, MA, 02151, US | Independent Contractor |
| United Brokers | N/A | 283 Cushman Ave, Revere, MA, 02151, US | Independent Contractor |
| United Brokers | <input checked="" type="checkbox"/> | 283 Cushman Ave, Revere, MA, 02151, US | Independent Contractor |

Business Ownership and Transfers

8. Identify each Business of which you were, in whole or in part, an owner, partner, or proprietor, or in which you owned more than 1% of any class of the outstanding stock or similar ownership interest, at any time during 2023, and provide the required information for each.

| Business Name | Address | Percentage of stock | Income |
|--|---|---------------------|---------------------|
| Faith Investments LLC dbaMTR Consulting Services | 1025 Revere Beach Parkway, Revere, MA, 02151, US | 100% | \$60,001 to 100,000 |
| Faith Investments LLC dbaMTR Consulting Services | 1025 Revere Beach Parkway, Revere, MA, 02151, US | | \$60,001 to 100,000 |
| Faith Investments LLC dbaMTR Consulting Services | 1025 Revere Beach Parkway, Revere, MA, 02151, US | | |

9. Identify each Business of which your spouse and/or any dependent child(ren) residing in your household was, in whole or in part, an owner, partner, or proprietor, or in which your spouse and/or any dependent child(ren) residing in your household owned more than 1% of any class of the outstanding stock or similar ownership interest, at any time during 2023, and provide the required information for each.

Filer reported none.

10. Identify any stock or similar ownership interest in a Business which you transferred to your spouse and/or any dependent child(ren) residing in your household during 2023, and provide the required information for each.

Filer reported none.

Service as an Officer, Director, or Trustee

11. Identify any Business in which you served as an officer, director, or trustee, at any time during 2023, whether compensated or not, and whether full- or part-time, and provide the required information for each.

| Business Name | Address | Position | Income |
|--------------------|--|----------|--------|
| CAYL Institute | 60 Gore St., Cambridge, MA, 02141, US | Officer | N/A |
| CAYL Institute | 31 Heath St, Jamaica Plain, MA, 02130, US | Director | N/A |
| Metro Credit Union | 200 Revere Beach Parkway, Chelsea, MA, 02150, US | Director | N/A |
| CAYL Institute | 31 Heath St, Jamaica Plain, MA, 02130, US | Director | N/A |

12. Identify any Business in which your spouse and/or any dependent child(ren) residing in your household served as an officer, director, or trustee, at any time during 2023, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Filer reported none.

NOTE: If the Filer answered “YES” to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member’s name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member’s address, the Filer was not required to provide that address.

Real Estate

13. Identify all Real Estate in Massachusetts which you owned directly or through a Business as of December 31, 2023, and which had an assessed value greater than \$1,000, and provide the required information for each Real Estate holding.

Ownership Legend:
Filer = F
Spouse/Child(ren) = S/C
Trust = T

| Property Address | Owner | Transferred? | Transferor Name | Transferor Address | Assessed Value |
|------------------|--------|--------------|-----------------|--------------------|-------------------|
| Redacted | F, S/C | No | | | \$100,001 or more |
| Redacted | F, S/C | No | | | \$100,001 or more |
| Redacted | F, S/C | No | | | \$100,001 or more |

14. Other than the Real Estate identified in Question 13, identify all Real Estate in Massachusetts which your spouse and/or any dependent child(ren) residing in your household owned directly or through a Business as of December 31, 2023, and which had an assessed value greater than \$1,000, and provide the required information for each Real Estate holding.

Filer reported none.

15. Identify any Trust of which you were a beneficiary, and which owned Real Estate in Massachusetts as of December 31, 2023, with an assessed value greater than \$1,000, and provide the required information for each such Trust and Real Estate holding.

Beneficiary Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

16. Other than the Real Estate identified in Question 15, identify any Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, and which owned Real Estate in Massachusetts as of December 31, 2023, with an assessed value greater than \$1,000, and provide the required information for each such Trust and Real Estate holding.

Filer reported none.

17. Identify any Real Estate in Massachusetts with an assessed value greater than \$1,000, that was transferred to another person or entity by you, or by a Trust of which you were a beneficiary, at any time during 2023, and provide the required information for each Real Estate holding.

Ownership Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

18. Other than the Real Estate identified in Question 17, identify any Real Estate in Massachusetts with an assessed value greater than \$1,000, that was transferred to another person or entity by your spouse and/or any dependent child(ren) residing in your household, or by a Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, at any time during 2023, and provide the required information for each piece of Real Estate transferred.

Ownership Legend:
Filer = F
Spouse/Child(ren) = S/C
Trust = T

Filer reported none.

19. Identify any Real Estate in Massachusetts with an assessed value greater than \$1,000, on which, as of December 31, 2023, you, or a Trust of which you were a beneficiary, had a lien, attachment, or mortgage receivable, and provide the required information for each.

Ownership Legend:
Filer = F
Spouse/Child(ren) = S/C
Trust = T

Filer reported none.

20. Other than the Real Estate identified in Question 19, identify any Real Estate in Massachusetts with an assessed value greater than \$1,000, on which, as of December 31, 2023, your spouse and/or any dependent child(ren) residing in your household, or a Trust of which your spouse and/or any dependent child(ren) residing in your household, had a lien, attachment, or mortgage receivable, and provide the required information for each.

Ownership Legend:
Filer = F
Spouse/Child(ren) = S/C
Trust = T

Filer reported none.

NOTE: If the Filer answered “YES” to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member’s name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member’s address, the Filer was not required to provide that address.

Financial Investments

21. Identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which you owned directly or through a Business, as of December 31, 2023, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Ownership Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

22. Other than the bonds or other securities identified in Question 21, identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which your spouse and/or any dependent child(ren) residing in your household owned directly or through a Business, as of December 31, 2023, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Filer reported none.

23. Identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which was owned as of December 31, 2023, by a Trust of which you were a beneficiary, whether directly or through a Business, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Beneficiary Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

24. Identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which was owned as of December 31, 2023, by a Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, whether directly or through a Business, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Filer reported none.

25. Identify every Financial Investment that you owned directly or through a Business as of December 31, 2023, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each.

Ownership Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

26. Other than the Financial Investments identified in Question 25, identify every Financial Investment that your spouse and/or any dependent child(ren) residing in your household owned directly or through a Business as of December 31, 2023, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each. For any Financial Investment not included on the drop-down list of publicly traded stock, you must provide the issuer's principal place of business or state of incorporation as well as its address.

Filer reported none.

27. Identify every Financial Investment that was owned as of December 31, 2023, by a Trust of which you were a beneficiary, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each. For any Financial Investment not included on the drop-down list of publicly traded stock, you must provide the issuer's principal place of business or state of incorporation as well as its address.

Beneficiary Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

28. Other than the Financial Investments identified in Question 27, identify every Financial Investment that was owned as of December 31, 2023, by a Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each. For any Financial Investment not included on the drop-down list of publicly traded stock, you must provide the issuer's principal place of business or state of incorporation as well as its address.

Filer reported none.

NOTE: If the Filer answered “YES” to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member’s name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member’s address, the Filer was not required to provide that address.

Debts and Mortgages

29. Identify all mortgages, including home equity and reverse mortgage loans, on your Primary Residence, on which more than \$1,000 was owed as of December 31, 2023, where the creditor (person who loaned you the money) is not, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

| Creditor Name | Creditor Address | Mortgage Term | Interest Rate (%) | Termination Year |
|---------------|---|---------------|-------------------|------------------|
| Mr Cooper | 5801 Postal Road, Cleveland, OH, 44181, US | 30 | 3.5 | 2051 |
| Mr Cooper | 1010 W. Mockingbird, Suite 100, Dallas, TX, 75247, US | 30 | 3.5 | 2051 |
| Mr Cooper | 1010 W. Mockingbird, Suite 100, Dallas, TX, 75247, US | 30 | 3.5 | 2051 |

30. Did you have a mortgage, including a home equity or reverse mortgage loan, on any property OTHER than your Primary Residence, on which more than \$1,000 was owed as of December 31, 2023, which you were obligated to pay and where the creditor (person who loaned you the money) is NOT, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative?

Obligor Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

31. Identify all mortgages, including home equity and reverse mortgage loans, other than any mortgage on your Primary Residence or any mortgage identified in response to Question 30, on which more than \$1,000 was owed as of December 31, 2023, and which your spouse and/or any dependent child(ren) residing in your household were obligated to pay and where the creditor (person who loaned the money to your spouse and/or dependent child(ren) residing in your household) is not, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

32. Identify all non-mortgage debts of more than \$1,000 that you owed as of December 31, 2023, IF the person to whom you owed the debt is not, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

33. Identify all non-mortgage debts of more than \$1,000 that your spouse and/or any dependent child(ren) residing in your household owed as of December 31, 2023, if the person to whom your spouse and/or any dependent child(ren) residing in your household owed the debt is not, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

34. Identify non-mortgage debts of more than \$1,000 which you owed and which were forgiven at any time during 2023, excluding debts forgiven by a person who is, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

35. Identify non-mortgage debts of more than \$1,000 that were owed by your spouse and/or any dependent child(ren) residing in your household and were forgiven at any time during 2023, excluding debts forgiven by a person who is, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

Reimbursements, Gifts, and Honoraria

36. Identify any Reimbursements for expenses in excess of \$100 provided to you at any time during 2023 by any legislative agent or executive agent (lobbyist).

Filer reported none.

36.a Identify any Reimbursements for expenses in excess of \$100, other than those identified in response to Question 36, you received at any time during 2023 from any person having a direct interest in a matter before the governmental body by which you were or are now employed.

Filer reported none.

37. Identify any Reimbursements for expenses in excess of \$100 provided to your spouse and/or any dependent child(ren) residing in your household at any time during 2023 by any legislative agent or executive agent (lobbyist).

Filer reported none.

37.a Identify any Reimbursements for expenses in excess of \$100, other than those identified in response to Question 36, provided to your spouse and/or dependent child(ren) residing in your household at any time during 2023 by any person having a direct interest in a matter before the governmental body by which you were or are now employed.

Filer reported none.

38. Identify any Gifts and/or Honoraria worth more than \$100 provided to you at any time during 2023 by any person having a direct interest in a matter before a governmental body by which you were or are now employed.

Filer reported none.

39. Identify any Gifts and/or Honoraria worth more than \$100 provided to your spouse and/or any dependent child(ren) residing in your household at any time during 2023 by any person having a direct interest in a matter before the governmental body by which you were or are now employed.

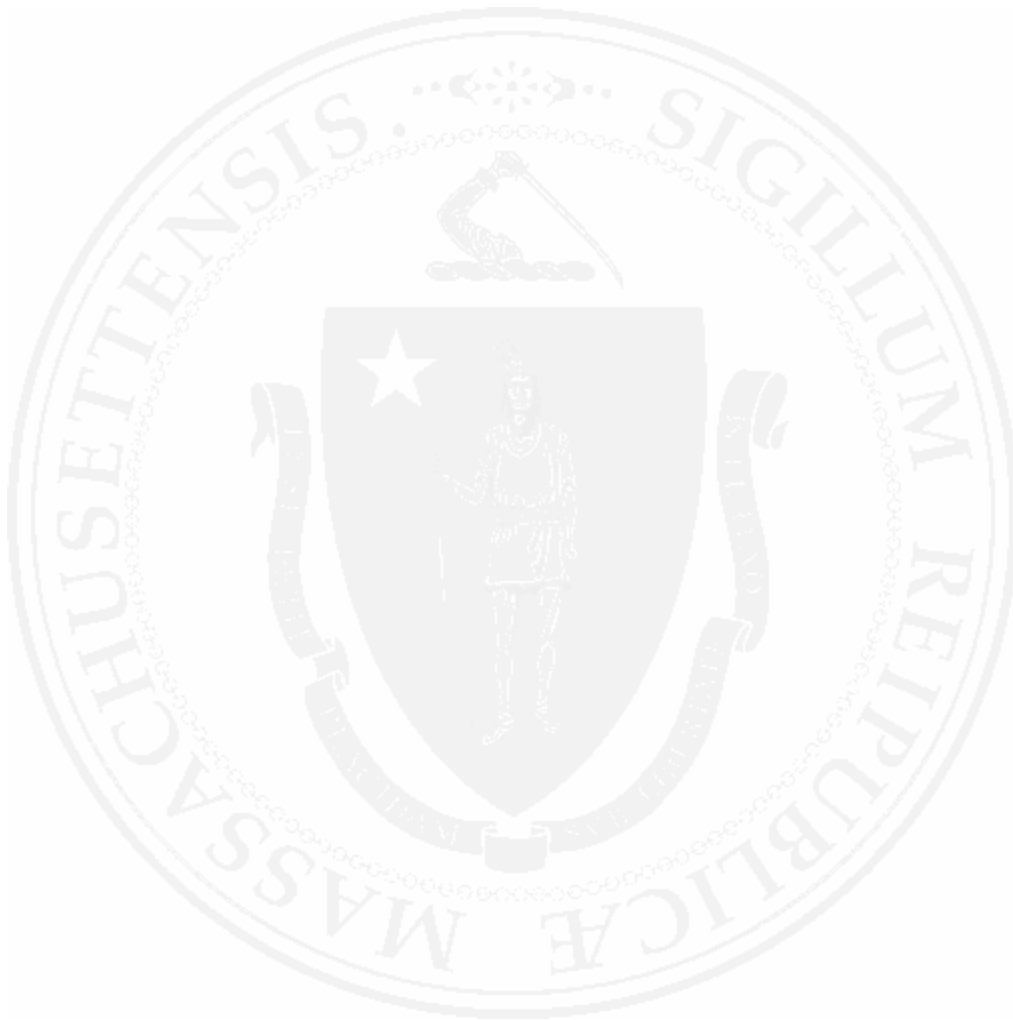
Filer reported none.

NOTE: If the Filer answered “YES” to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member’s name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member’s address, the Filer was not required to provide that address.

Blind Trusts

40. Did you, your spouse and/or any dependent child(ren) residing in your household during 2023, own anything that you have not reported on this Statement of Financial Interests because it was held in a Blind Trust during 2023?

Filer reported none.



CERTIFICATION

I, Marta T Rosa, certify under the pains and penalties of perjury that:

I made a diligent effort to obtain the required information concerning myself and my spouse and/or any dependent child(ren); and

The information provided on this form is true and complete, to the best of my knowledge.

Submitted: 02/01/2024

Did your spouse and/or any dependent child(ren) residing in your household decline to disclose information which is necessary to complete this form fully and accurately?

The following are the specific Question(s) which I decline to answer in whole or in part because I assert that the information is privileged by law:

Please explain the basis of your claim of privilege:

IMPORTANT:

1. No DESIGNATED PUBLIC EMPLOYEE shall be allowed to continue in their duties or to receive compensation from public funds unless they have filed a Statement of Financial Interests with the State Ethics Commission.
2. The State Ethics Commission does not accept a faxed or emailed copy of a Statement of Financial Interests for filing.
3. If you were required to amend your Statement of Financial Interests last year, we encourage you to carefully review your 2023 filing before submitting.