

YOUR PUBLIC FINANCIAL DISCLOSURE FORM (OGE 278)

BE SURE YOUR OGE 278 IS READY FOR WEB POSTING

COVER PAGE

- Use your official address and phone number.
- DO NOT use your personal address or phone number.
- Our office will redact signatures before posting.
- NEVER put your social security number, birth date, home address, home phone number, or spouse's or children's names or personal information on the form.

SCHEDULE A

- When reporting spouse and dependent child assets DO NOT use their names-- Instead use S, DC1, DC2, etc.
- DO NOT include the names of family members in the name of a trust or other investment vehicle. Instead use identifiers like S, DC1, DC2, etc. (For example: The S Irrevocable Trust, The (Grandfather) Family Trust).
- DO NOT include account numbers. If you organize your assets by brokerage account or managed account, use names such as ABC Brokerage IRA Acct. #1 (be sure to use same name from year to year so we can track it when we review subsequent filings).
- DO NOT include street address of rental property or investment property— include only city and state.
- DO NOT report personal residences, including vacation homes that are not rented out during the filing season.
- DO NOT include checking, savings, or money market accounts if aggregated value is \$5000 or less in a single financial institution.
- DO NOT report the amount of spouse's or dependent children's income. Report only the source and type of income (e.g., salary, consulting fees). Again, DO NOT include the names of your spouse or children.
- DO NOT attach brokerage statements to the OGE 278 if these statements have any of the above private information that is not required to be reported on your

form. Brokerage statements usually contain a significant amount of non-reportable information. Accordingly, we strongly discourage using brokerage statements as attachments unless you are comfortable with web posting of this personal information.

SCHEDULE B, Part I, Transactions

- DO NOT report transactions involving your personal residence—unless it is a rental property—then only include city and state—DO NOT include street addresses.
- DO NOT include account numbers.
- DO NOT include spouse or dependent children's names.
- See above comment regarding brokerage statements as attachments (very strongly discouraged).

SCHEDULE B, Part II, Gifts, Reimbursements, and Travel Expenses

- DO NOT report anything received as a gift from a relative
- DO NOT report a gift of travel for official travel

SCHEDULE C, Part I, Liabilities

- DO NOT report mortgages on personal residences unless rented out—NOTE: Senate Confirmed Presidential Appointees and Commissioned Corps Officers at O-7 or above are now required to report mortgages on personal residences.
- DO NOT report street addresses—city/state only.

Additional detailed guidance on how to fill in your OGE 278 may be found at:

<http://www.oge.gov/Financial-Disclosure/Public-Financial-Disclosure-278/Nominee-and-New-Entrant-278-Guide/Nominee---New-Entrant-278-Guide/>
(Latest guidance from OGE for all OGE 278 sections except Transactions designed for Senate Confirmed Appointees but applicable to all filers)

<http://www.oge.gov/Financial-Disclosure/Public-Financial-Disclosure-278/Helpful-Resources/Helpful-Resources-for-Public-Financial-Disclosure/> (Use this link for guidance on Transactions which is not included in the new, updated guidance above).