GENERAL INSTRUCTIONS

☐ When you file an annual report, remember to check the “Annual” box at the top of page one of the form.

☐ Remember to check “yes” or “no” to each statement (I-V) on page one of the form, including Statement V: “I have reportable gifts . . .”

☐ Remember to sign and date the signature page of the report with an ink pen.

PART I: ASSETS AND INCOME

☐ Do not report your Thrift Savings Plan (TSP).

☐ For an IRA or 401(k) account, you must list each asset in the account that is more than $1,000 in value (except diversified funds, cash, and money market funds).

PART II: LIABILITIES

☐ Do not report a:
  • mortgage (even for rental property),
  • student loan, or
  • car loan.

PART III: OUTSIDE POSITIONS

☐ Do not report positions with a religious, social, fraternal, or political organization.

☐ Do not report your position with a homeowner’s association.

PART IV: AGREEMENTS AND ARRANGEMENTS

☐ If you reported a pension held by a former employer in Part I, you must report the pension as an agreement/arrangement here in Part IV.

PART V: GIFTS AND TRAVEL REIMBURSEMENTS

☐ Do not report gifts/payments for official Government travel.
  - You do not need to report gifts from relatives.

For further guidance, contact the Ethics Law and Programs Division at 202-482-5384 or ethicsdivision@doc.gov.