

**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.

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