

ETHICS GUIDANCE
PUBLIC FINANCIAL DISCLOSURE REPORTS –
OGE FORM 278s



GENERAL INSTRUCTIONS

- Sign and date your report.
- Do not list personally identifying information, if not required. For example, do include names of relatives, whether an asset is held by you or your spouse, or the street address of residential property.

SCHEDULE A
ASSETS AND INCOME

- For each asset over \$1,000 in value, you should mark three categories:
 - the value of the asset at the end of the reporting period (December 31st for annual reports),
 - the type of income (or that the asset is an Excepted Investment Fund (EIF)),
 - the amount of income received during the reporting period.
- List the specific and complete name of each mutual fund.
- For an IRA or 401(k) account list:
 - each asset in the account worth more than \$1,000 and
 - the name of the financial institution in which the account is held.

SCHEDULE B – PART I
TRANSACTIONS

- If you report a sale, report income over \$200 received from the sale on Schedule A (but mark the value of the asset as “None (or less than \$1,001”).

SCHEDULE B – PART II
GIFTS, REIMBURSEMENTS, AND
TRAVEL REIMBURSEMENTS

- Do not report payments for official travel (they are reported on forms CD 210 and SF 326).

SCHEDULE C – PART I
LIABILITIES

- Report a mortgage on your personal residence if you are a Presidential appointee in a Senate-confirmed position or if it produces rental income or is investment property.
- Do not report a car loan.

SCHEDULE C – PART II
AGREEMENTS OR ARRANGEMENTS

- List pensions on both Schedule A and Schedule C.

SCHEDULE D – PART I
POSITIONS HELD OUTSIDE THE U.S.
GOVERNMENT

- If you received income from a position, report the specific amount of compensation received on Schedule A.

SCHEDULE D – PART II
COMPENSATION IN EXCESS OF
\$5,000 PAID BY ONE SOURCE

- Fill this out only if you are a new filer.