### 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,
  - credit card debt, 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.