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

▪ Only report sources of income greater than $1,000.*
▪ 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 (except diversified funds, cash, and money market funds).
▪ Do not report diversified mutual funds held in an employee benefit plan.*
▪ You must report virtual currency if the value is greater than $1,000 or if it produced income of greater than $1,000.*

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 a position 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.
▪ Do not report an employee defined contribution plan if your former employer is no longer making contributions to the plan.

PART V: GIFTS AND TRAVEL REIMBURSEMENTS

▪ Do not report gifts/payments for official Government travel.
▪ You do not need to report gifts from relatives.
▪ Do not report travel payments or reimbursements in connection with non-Federal employment.*

* change made on the OGE Form 450 as of January 1, 2019