Report Type: New Entrant Report
Year (Annual Report only):
Date of Appointment: 05/2025
Date of Termination:
Appointment Type: Non-Career

Executive Branch Personnel
Public Financial Disclosure Report (OGE Form 278e)

Filer's Information

Donaldson, David P

Grant Coordinator, Trump-Vance (2025) - White House

Date of Appointment: 05/12/2025

Other Federal Government Positions Held During the Preceding 12 Months:
None

Electronic Signature - I certify that the statements I have made in this form are true, complete and correct to the best of my knowledge.

/s/ Donaldson, David P [electronically signed on 05/25/2025 by Donaldson, David P in Integrity.gov]

Agency Ethics Official's Opinion - On the basis of information contained in this report, I conclude that the filer is in compliance with applicable laws and regulations (subject to any comments below).

/s/ Gast, Scott F, Certifying Official [electronically signed on 12/12/2025 by Gast, Scott F in Integrity.gov]

Other review conducted by

/s/ Jones, David M, Ethics Official [electronically signed on 12/12/2025 by Jones, David M in Integrity.gov]

U.S. Office of Government Ethics Certification

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1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME	CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	Cityserve International	Springfield, Missouri	Non-Profit	Chairman/CEO	6/2017	4/2025
2	Neighborhoods to Nations	Springfield, Missouri	Non-Profit	CEO	1/2020	4/2025
3	Grand Canyon University	Phoenix, Arizona	Non-Profit	Board Member	9/2024	4/2025
4	ChildHope	Springfield, Missouri	Non-Profit	Board Member	11/2022	2/2025

2. Filer's Employment Assets & Income and Retirement Accounts

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	IRA #1:	No			
1.1	iShares Large Cap Deep Buffer ETF (IVVB)	Yes	$1,001 - $15,000		None (or less than $201)
1.2	iShares Core S&P 500 ETF (IVV)	Yes	$1,001 - $15,000		None (or less than $201)
1.3	SPDR PortfolioEmerging Markets ETF (SPEM)	Yes	$1,001 - $15,000		None (or less than $201)
1.4	Vanguard Total International Stock Index Fund ETF Shares (VXUS)	Yes	$1,001 - $15,000		None (or less than $201)
1.5	iShares TIPS Bond ETF (TIP)	Yes	$1,001 - $15,000		None (or less than $201)
1.6	Italian Exhibition Group SpA Ordinary Shares (IEG)	Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.7	iShares 0-5 Year TIPS Bond ETF (STIP)	Yes	$1,001 - $15,000		None (or less than $201)
1.8	F/m Ultrshrt Trs Infl-Protd Sec TIPS ETF (RBIL)	Yes	$1,001 - $15,000		None (or less than $201)
1.9	SPDR Bloomberg Barclays 1-3 Month T-Bill ETF (BIL)	Yes	$15,001 - $50,000		None (or less than $201)
1.10	PIMCO Commodity Strategy Act Exc-Trd Fd (CMDT)	Yes	$1,001 - $15,000		None (or less than $201)
1.11	SPDR Gold MiniShares Trust (GLDM)	Yes	$1,001 - $15,000		None (or less than $201)
2	IRA #2:	No			
2.1	Steward Large Cap Enhanced Index Fund Institutional Class Shares (SEECX)	Yes	$15,001 - $50,000		None (or less than $201)
2.2	Steward Large Cap Value I (SJVIX)	Yes	$15,001 - $50,000		None (or less than $201)
2.3	Steward Large Cap Growth I (SJGIX)	Yes	$15,001 - $50,000		None (or less than $201)
2.4	Steward Large Cap Core I (SJCIX)	Yes	$15,001 - $50,000		None (or less than $201)
2.5	Steward Equity Market Neutral I (SMNIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.6	Steward Covered Call Income Fund Institutional Class Shares (SCJIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.7	Steward Values Enhanced International I (SNTCX)	Yes	$15,001 - $50,000		None (or less than $201)
2.8	Steward Values Enhanced SmMidCapI (SCECX)	Yes	$15,001 - $50,000		None (or less than $201)
2.9	Steward Global Equity Income Fund I (SGISX)	Yes	$15,001 - $50,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3	IRA #3:		No			
3.1	Fidelity Government Cash Reserves (FDRXX)		Yes	$1,001 - $15,000		None (or less than $201)
3.2	First Trust Alternative Opportunities I (VFLEX)		Yes	$100,001 - $250,000		None (or less than $201)
4	IRA #4:		No			
4.1	Energy Select Sector SPDR Fund (XLE)		Yes	$1,001 - $15,000		None (or less than $201)
4.2	iShares 1-3 Year Treasury Bond ETF (SHY)		Yes	$1,001 - $15,000		None (or less than $201)
4.3	Vanguard Total Stock Market Index Fund ETF Class Shares (VTI)		Yes	$1,001 - $15,000		None (or less than $201)
4.4	Airbnb Inc. Class A Common Stock (ABNB)		N/A	$1,001 - $15,000		None (or less than $201)
4.5	Amazon.com, Inc. (AMZN)		N/A	$1,001 - $15,000		None (or less than $201)
4.6	Clean Harbors, Inc. (CLH)		N/A	$1,001 - $15,000		None (or less than $201)
4.7	Piramal Enterprises Ltd (PEL)		N/A	$1,001 - $15,000		None (or less than $201)
4.8	ChargePoint Holdings Inc. Common Stock (CHPT)		N/A	$1,001 - $15,000		None (or less than $201)
4.9	Expeditors International of Washington, Inc. (EXPD)		N/A	$1,001 - $15,000		None (or less than $201)
5	CityServe International		N/A		Salary	$275,000
6	Neighborhoods to Nations	See Endnote	N/A		Salary	$113,761
7	Grand Canyon University - Honorarium - September 30, 2024		N/A		honorarium	$2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
8	W. North Fund	No	None (or less than $1,001)	Dividends	$1,001 - $2,500

3. Filer's Employment Agreements and Arrangements

None

4. Filer's Sources of Compensation Exceeding $5,000 in a Year

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES
1	CityServe International	Springfield, Missouri	CEO
2	Neighborhoods to Nations	Springfield, Missouri	CEO

5. Spouse's Employment Assets & Income and Retirement Accounts

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	IRA	No			
1.1	Steward Large Cap Enhanced Index Fund Institutional Class Shares (SEECX)	Yes	$1,001 - $15,000		None (or less than $201)
1.2	Steward Large Cap Value I (SJVIX)	Yes	$1,001 - $15,000		None (or less than $201)
1.3	Steward Large Cap Growth I (SJGIX)	Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.4	Steward Equity Market Neutral I (SMNIX)	Yes	$1,001 - $15,000		None (or less than $201)
1.5	Steward Values Enhanced International I (SNTCX)	Yes	$1,001 - $15,000		None (or less than $201)
1.6	Steward Values Enhanced SmMidCap I (SCECX)	Yes	$1,001 - $15,000		None (or less than $201)
1.7	Steward Global Equity Income Fund I (SGISX)	Yes	$1,001 - $15,000		None (or less than $201)
1.8	Steward Large Cap Core I (SJCIX)	Yes	$1,001 - $15,000		$201 - $1,000

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	U.S. bank #1 (cash)	N/A	$15,001 - $50,000		None (or less than $201)
2	U.S. bank #2 (cash)	N/A	$15,001 - $50,000		None (or less than $201)
3	U.S. bank #3 (cash)	N/A	$1,001 - $15,000		None (or less than $201)
4	Charles Schwab Brokerage Account #1	No			
4.1	Newsmax, Inc. (NMAX)	N/A	$15,001 - $50,000		None (or less than $201)
5	Signatry Donor Advised Fund See Endnote		$15,001 - $50,000		None (or less than $201)
5.1	SIG moderate allocation pool	Yes	$15,001 - $50,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
6	Charles Schwab Donor Advised Funds	No	$15,001 - $50,000		None (or less than $201)
7	Newsmax, Inc. (NMAX)	N/A	$100,001 - $250,000		
8	Palantir Technologies Inc. Class A Common Stock (PLTR)	N/A	$1,001 - $15,000		$201 - $1,000
9	Amazon.com, Inc. (AMZN)	N/A	$1,001 - $15,000		None (or less than $201)
10	Amgen Inc. (AMGN)	N/A	$1,001 - $15,000		None (or less than $201)
11	Chevron Corp. (CVX)	N/A	$1,001 - $15,000		None (or less than $201)
12	Chord Energy Corporation Common Stock (CHRD)	N/A	$1,001 - $15,000		None (or less than $201)
13	Eli Lilly & Co. (LLY)	N/A	$1,001 - $15,000		$201 - $1,000
14	Energy Select Sector SPDR Fund (XLE)	N/A	None (or less than $1,001)		None (or less than $201)
15	EOG Resources, Inc. (EOG)	N/A	None (or less than $1,001)		None (or less than $201)
16	Host Hotels & Resorts, Inc. (HST)	N/A	$1,001 - $15,000		None (or less than $201)
17	NVIDIA Corp. (NVDA)	N/A	$1,001 - $15,000		None (or less than $201)
18	Walmart, Inc. (WMT)	N/A	$1,001 - $15,000		None (or less than $201)
19	Fidelity Government Cash Reserves (FDRXX)	N/A	$1,001 - $15,000		None (or less than $201)
20	Apple, Inc. (AAPL)	N/A	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
21	Delta Air Lines, Inc. (DAL)	N/A	$1,001 - $15,000		None (or less than $201)
22	The Walt Disney Co. (DIS)	N/A	$1,001 - $15,000		None (or less than $201)
23	Microsoft Corp. (MSFT)	N/A	$1,001 - $15,000		None (or less than $201)
24	Novo Nordisk A/S Common Stock (NVO)	N/A	$1,001 - $15,000		None (or less than $201)
25	Amdocs Limited Ordinary Shares (DOX)	N/A	$1,001 - $15,000		None (or less than $201)
26	Johnson Controls International Plc (JCI)	N/A	$1,001 - $15,000		None (or less than $201)
27	Medtronic Plc (MDT)	N/A	$1,001 - $15,000		None (or less than $201)
28	Signet Jewelers Ltd. (SIG)	N/A	$1,001 - $15,000		None (or less than $201)
29	TE Connectivity PLC Registered Shares (TEL)	N/A	$1,001 - $15,000		None (or less than $201)
30	Logitech International S.A. Ordinary Shares (LOGI)	N/A	$1,001 - $15,000		None (or less than $201)
31	NXP Semiconductors N.V. Common Stock (NXPI)	N/A	$1,001 - $15,000		None (or less than $201)
32	ASE Technology Holding Co Ltd ADR (ASX)	N/A	$1,001 - $15,000		None (or less than $201)
33	Abbott Laboratories (ABT)	N/A	$1,001 - $15,000		None (or less than $201)
34	Air Products and Chemicals, Inc. (APD)	N/A	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
35	Amgen Inc. (AMGN)	N/A	$1,001 - $15,000		None (or less than $201)
36	Analog Devices, Inc. (ADI)	N/A	$1,001 - $15,000		None (or less than $201)
37	Avnet, Inc. (AVT)	N/A	$1,001 - $15,000		None (or less than $201)
38	Banco BBVA Argentina S.A. ADS (BBAR)	N/A	$1,001 - $15,000		None (or less than $201)
39	Bank Nova Scotia Halifax Pfd 3 Ordinary Shares (BNS)	N/A	$1,001 - $15,000		None (or less than $201)
40	Broadridge Financial Solutions, Inc. (BR)	N/A	$1,001 - $15,000		None (or less than $201)
41	Broadcom, Inc. (AVGO)	N/A	$1,001 - $15,000		None (or less than $201)
42	Cigna Corp. (CI)	N/A	$1,001 - $15,000		None (or less than $201)
43	Canadian Imperial Bank of Commerce Common Stock (CM)	N/A	$1,001 - $15,000		None (or less than $201)
44	Canadian National Railway Company Common Stock (CNI)	N/A	$1,001 - $15,000		None (or less than $201)
45	Cisco Systems, Inc. (CSCO)	N/A	$1,001 - $15,000		None (or less than $201)
46	The Coca-Cola Co. (KO)	N/A	$1,001 - $15,000		None (or less than $201)
47	Cognizant Technology Solutions Corp. (CTSH)	N/A	$1,001 - $15,000		None (or less than $201)
48	Comcast Corp. (CMCSA)	N/A	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
49	Cia Energetica DE Minas Gerais - Cemig ADR (CIG)	N/A	$1,001 - $15,000		None (or less than $201)
50	Enel Chile SA ADR (ENIC)	N/A	$1,001 - $15,000		None (or less than $201)
51	Fortis Inc. (FTS)	N/A	$1,001 - $15,000		None (or less than $201)
52	GAP Inc. (GAP)	N/A	$1,001 - $15,000		None (or less than $201)
53	General Dynamics Corp. (GD)	N/A	$1,001 - $15,000		None (or less than $201)
54	General Mills, Inc. (GIS)	N/A	$1,001 - $15,000		None (or less than $201)
55	Gilead Sciences, Inc. (GILD)	N/A	$1,001 - $15,000		None (or less than $201)
56	HSBC High Yield Fund Class I	Yes	$1,001 - $15,000		None (or less than $201)
57	HP, Inc. (HPQ)	N/A	$1,001 - $15,000		None (or less than $201)
58	HP, Inc. (HPQ)	N/A	$1,001 - $15,000		None (or less than $201)
59	Hewlett-Packard Enterprise Co. (HPE)	N/A	$1,001 - $15,000		None (or less than $201)
60	The Home Depot, Inc. (HD)	N/A	$1,001 - $15,000		None (or less than $201)
61	International Business Machines Corp. (IBM)	N/A	$1,001 - $15,000		None (or less than $201)
62	Interpublic Group of Cos., Inc. (IPG)	N/A	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
63	Juniper Networks, Inc. (JNPR)	N/A	$1,001 - $15,000		None (or less than $201)
64	Lloyds Banking Group Plc American Depositary Shares (LYG)	N/A	$1,001 - $15,000		None (or less than $201)
65	McDonald's Corp. (MCD)	N/A	$1,001 - $15,000		None (or less than $201)
66	NatWest Group plc American Depositary Shares (NWG)	N/A	$1,001 - $15,000		None (or less than $201)
67	NetApp, Inc. (NTAP)	N/A	$1,001 - $15,000		None (or less than $201)
68	Omnicom Group, Inc. (OMC)	N/A	$1,001 - $15,000		None (or less than $201)
69	Open Text Corporation Common Shares (OTEX)	N/A	$1,001 - $15,000		None (or less than $201)
70	PLDT Inc. Sponsored ADR (PHI)	N/A	$1,001 - $15,000		None (or less than $201)
71	Paychex, Inc. (PAYX)	N/A	$1,001 - $15,000		None (or less than $201)
72	RF Industries Ltd. (RFIL)	N/A	$1,001 - $15,000		None (or less than $201)
73	Royal Bank Of Canada Common Stock (RY)	N/A	$1,001 - $15,000		None (or less than $201)
74	Shell PLC ADR (Representing - Ordinary Shares) (SHEL)	N/A	$1,001 - $15,000		None (or less than $201)
75	Snap-On, Inc. (SNA)	N/A	$1,001 - $15,000		None (or less than $201)
76	Sun Life Financial Inc. Common Stock (SLF)	N/A	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
77	Suncor Energy Inc. Common Stock (SU)	N/A	$1,001 - $15,000		None (or less than $201)
78	Sysco Corp. (SYY)	N/A	$1,001 - $15,000		None (or less than $201)
79	Sysco Corp. (SYY)	N/A	$1,001 - $15,000		None (or less than $201)
80	Taiwan Semiconductor Manufacturing Company Ltd. (TSM)	N/A	$1,001 - $15,000		None (or less than $201)
81	Target Corp. (TGT)	N/A	$1,001 - $15,000		None (or less than $201)
82	TEGNA, Inc. (TGNA)	N/A	$1,001 - $15,000		None (or less than $201)
83	TIM S.A. American Depositary Shares (Each representing 5 Common Shares) (TIMB)	N/A	$1,001 - $15,000		None (or less than $201)
84	The Toronto-Dominion Bank (TD)	N/A	$1,001 - $15,000		None (or less than $201)
85	United Microelectronics Corporation (NEW) Common Stock (UMC)	N/A	$1,001 - $15,000		None (or less than $201)
86	Veren Inc. (VRN)	N/A	$1,001 - $15,000		None (or less than $201)
87	Warner Music Group Corp. Class A Common Stock (WMG)	N/A	$1,001 - $15,000		None (or less than $201)
88	Crown Castle International Corp. (CCI)	N/A	$1,001 - $15,000		None (or less than $201)
89	Rayonier, Inc. (RYN)	N/A	$1,001 - $15,000		None (or less than $201)
90	SF CALIF CITY MUNI	N/A	$15,001 - $50,000	Dividends	$1,001 - $2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
91	CAL STATE GO VAR PURP BND	N/A	$15,001 - $50,000	Dividends	$201 - $1,000
92	FAIRFAX COUNTY, VA BND	N/A	$15,001 - $50,000	Dividends	$201 - $1,000
93	SAN DIEGO, CA PUB FACS	N/A	$15,001 - $50,000	Dividends	$201 - $1,000
94	CAL STATE VAR PURP GO BNDS	N/A	$15,001 - $50,000	Dividends	$1,001 - $2,500
95	CAL STATE VAR PURP GO BNDS	N/A	$15,001 - $50,000	Dividends	$201 - $1,000
96	CHESAPEAKE, VA GO PUB IMPT BNDS	N/A	$15,001 - $50,000	Dividends	$201 - $1,000
97	VA TRANSN BRD	N/A	$15,001 - $50,000	Dividends	$201 - $1,000
98	CAL STATE GO BDS	N/A	$1,001 - $15,000	Dividends	$201 - $1,000
99	LOS ANGELES DEPT ARPTS REV INTL	N/A	$1,001 - $15,000	Dividends	$201 - $1,000
100	CAL MUNI FIN AUTH REV	N/A	$1,001 - $15,000	Dividends	$201 - $1,000
101	FAIRFAX COUNTY VA PUB IMPT BDS	N/A	$15,001 - $50,000	Dividends	$201 - $1,000
102	CAL STATE UNIV REV SYSTEM WIDE	N/A	$1,001 - $15,000	Dividends	$201 - $1,000
103	CAL ST VARIOUS PURP GO REF	N/A	$15,001 - $50,000	Dividends	$1,001 - $2,500
104	CHALOTTESVILLE, VA GO PUB IMPT	N/A	$1,001 - $15,000	Dividends	$201 - $1,000
105	EUREKA, CA CITY SCHS GO BDS	N/A	$15,001 - $50,000	Dividends	$201 - $1,000
106	SANTA MARGARITA, CA WTR DIST SPL	N/A	$15,001 - $50,000	Dividends	$1,001 - $2,500

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
107	SF CAL CITY & CNTY PUB		N/A	$15,001 - $50,000	Dividends	$201 - $1,000
108	HENRICO CNTY, VA GO PUB IMPT BDS		N/A	$15,001 - $50,000	Dividends	$201 - $1,000
109	LEXINGTON, VA GO PUB IMPT BDS		N/A	$1,001 - $15,000	Dividends	$201 - $1,000
110	CanyonBrook Enterprises (Personal Asset Management)		N/A			
110.1	"Rock Solid" discipleship materials (value not readily ascertainable)		N/A		Rent or Royalties	$2,501 - $5,000
110.2	Note from family member		N/A	$500,001 - $1,000,000	Interest	$15,001 - $50,000
110.3	Residential real estate, Bakersfield, CA		N/A	$500,001 - $1,000,000	Rent or Royalties	$2,501 - $5,000
110.4	Residential real estate, Las Vegas, NV		N/A	$250,001 - $500,000		None (or less than $201)
111	Oil & Gas Royalties - North Dakota	See Endnote	N/A	Over $1,000,000	Rent or Royalties	$100,001 - $1,000,000

7. Transactions

(N/A) - Not required for this type of report

8. Liabilities

None

9. Gifts and Travel Reimbursements

(N/A) - Not required for this type of report

Endnotes

PART	#	ENDNOTE
2.	6	I resigned from Neighborhoods to Nations on April 11, 2025 but funds were paid to me in early May -- owed to me for previous work and a 2024 bonus.
6.	5	Funds used for donations and tithes
6.	111	Oil and gas royalties from the following companies: CHORD HESS Continental Resources Oasis

Summary of Contents

1. Filer's Positions Held Outside United States Government

Part 1 discloses positions that the filer held at any time during the reporting period (excluding positions with the United States Government). Positions are reportable even if the filer did not receive compensation.

This section does not include the following: (1) positions with religious, social, fraternal, or political organizations; (2) positions solely of an honorary nature; (3) positions held as part of the filer's official duties with the United States Government; (4) mere membership in an organization; and (5) passive investment interests as a limited partner or non-managing member of a limited liability company.

2. Filer's Employment Assets & Income and Retirement Accounts

Part 2 discloses the following:

- Sources of earned and other non-investment income of the filer totaling more than $200 during the reporting period (e.g., salary, fees, partnership share, honoraria, scholarships, and prizes)
- Assets related to the filer's business, employment, or other income-generating activities (1) that ended the reporting period with a value greater than $1,000 or (2) from which more than $200 in income was received during the reporting period (e.g., equity in business or partnership, stock options, retirement plans/accounts and their underlying holdings as appropriate, deferred compensation, and intellectual property, such as book deals and patents)

This section does not include assets or income from United States Government employment or assets that were acquired separately from the filer's business, employment, or other income-generating activities (e.g., assets purchased through a brokerage account). Note: The type of income is not required if the amount of income is $0 - $200 or if the asset qualifies as an excepted investment fund (EIF).

3. Filer's Employment Agreements and Arrangements

Part 3 discloses agreements or arrangements that the filer had during the reporting period with an employer or former employer (except the United States Government), such as the following:

- Future employment
- Leave of absence
- Continuing payments from an employer, including severance and payments not yet received for previous work (excluding ordinary salary from a current employer)
- Continuing participation in an employee welfare, retirement, or other benefit plan, such as pensions or a deferred compensation plan
- Retention or disposition of employer-awarded equity, sharing in profits or carried interests (e.g., vested and unvested stock options, restricted stock, future share of a company's profits, etc.)

4. Filer's Sources of Compensation Exceeding $5,000 in a Year

Part 4 discloses sources (except the United States Government) that paid more than $5,000 in a calendar year for the filer's services during any year of the reporting period.

The filer discloses payments both from employers and from any clients to whom the filer personally provided services. The filer discloses a source even if the source made its payment to the filer's employer and not to the filer. The filer does not disclose a client's payment to the filer's employer if the filer did not provide the services for which the client is paying.

5. Spouse's Employment Assets & Income and Retirement Accounts

Part 5 discloses the following:

- Sources of earned income (excluding honoraria) for the filer's spouse totaling more than $1,000 during the reporting period (e.g., salary, consulting fees, and partnership share)
- Sources of honoraria for the filer's spouse greater than $200 during the reporting period
- Assets related to the filer's spouse's employment, business activities, other income-generating activities (1) that ended the reporting period with a value greater than $1,000 or (2) from which more than $200 in income was received during the reporting period (e.g., equity in business or partnership, stock options, retirement plans/accounts and their underlying holdings as appropriate, deferred compensation, and intellectual property, such as book deals and patents)

This section does not include assets or income from United States Government employment or assets that were acquired separately from the filer's spouse's business, employment, or other income-generating activities (e.g., assets purchased through a brokerage account). Note: The type of income is not required if the amount of income is $0 - $200 or if the asset qualifies as an excepted investment fund (EIF). Amounts of income are not required for a spouse's earned income (excluding honoraria).

6. Other Assets and Income

Part 6 discloses each asset, not already reported, (1) that ended the reporting period with a value greater than $1,000 or (2) from which more than $200 in investment income was received during the reporting period. For purposes of the value and income thresholds, the filer aggregates the filer's interests with those of the filer's spouse and dependent children.

This section does not include the following types of assets: (1) a personal residence (unless it was rented out during the reporting period); (2) income or retirement benefits associated with United States Government employment (e.g., Thrift Savings Plan); and (3) cash accounts (e.g., checking, savings, money market accounts) at a single financial institution with a value of $5,000 or less (unless more than $200 in income was received). Additional exceptions apply. Note: The type of income is not required if the amount of income is $0 - $200 or if the asset qualifies as an excepted investment fund (EIF).

7. Transactions

Part 7 discloses purchases, sales, or exchanges of real property or securities in excess of $1,000 made on behalf of the filer, the filer's spouse or dependent child during the reporting period.

This section does not include transactions that concern the following: (1) a personal residence, unless rented out; (2) cash accounts (e.g., checking, savings, CDs, money market accounts) and money market mutual funds; (3) Treasury bills, bonds, and notes; and (4) holdings within a federal Thrift Savings Plan account. Additional exceptions apply.

8. Liabilities

Part 8 discloses liabilities over $10,000 that the filer, the filer's spouse or dependent child owed at any time during the reporting period.

This section does not include the following types of liabilities: (1) mortgages on a personal residence, unless rented out (note: certain PAS nominees and appointees are required to report all mortgages); (2) loans secured by a personal motor vehicle, household furniture, or appliances, unless the loan exceeds the item's purchase price; and (3) revolving charge accounts, such as credit card balances, if the outstanding liability did not exceed $10,000 at the end of the reporting period. Additional exceptions apply.

9. Gifts and Travel Reimbursements

This section discloses:

- Gifts totaling more than $480 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.
- Travel reimbursements totaling more than $480 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.

For purposes of this section, the filer need not aggregate any gift or travel reimbursement with a value of $192 or less. Regardless of the value, this section does not include the following items: (1) anything received from relatives; (2) anything received from the United States Government or from the District of Columbia, state, or local governments; (3) bequests and other forms of inheritance; (4) gifts and travel reimbursements given to the filer's agency in connection with the filer's official travel; (5) gifts of hospitality (food, lodging, entertainment) at the donor's residence or personal premises; and (6) anything received by the filer's spouse or dependent children totally independent of their relationship to the filer. Additional exceptions apply.

Privacy Act Statement

5 U.S.C.§ 13101 et seq., and 5 C.F.R. Part 2634 of the U. S. Office of Government Ethics regulations require the reporting of this information. Failure to provide the requested information may result in separation, disciplinary action, or civil action. The primary use of the information on this report is for review by Government officials to determine compliance with applicable Federal laws and regulations. This report may also be disclosed upon request to any requesting person in accordance with 5 U.S.C. §§ 13107 and § 13122(b)(1) or as otherwise authorized by law. You may inspect applications for public access of your own form upon request. Additional disclosures of the information on this report may be made: (1) to any requesting person, subject to the limitation contained in section 208(d)(1) of title 18, any determination granting an exemption pursuant to sections 208(b)(1) and 208(b)(3) of title 18; (2) to a Federal, State, or local law enforcement agency if the disclosing agency becomes aware of violations or potential violations of law or regulation; (3) to a source when necessary to obtain information relevant to a conflict of interest investigation or determination; (4) to the National Archives and Records Administration or the General Services Administration in records management inspections; (5) to the Office of Management and Budget during legislative coordination on private relief legislation; (6) when the disclosing agency determines that the records are arguably relevant to a proceeding before a court, grand jury, or administrative or adjudicative body, or in a proceeding before an administrative or adjudicative body when the adjudicator determines the records to be relevant to the proceeding; (7) to reviewing officials in a new office, department or agency when an employee transfers or is detailed from one covered position to another, a public financial disclosure report and any accompanying documents, including statements notifying an employee's supervising ethics office of the commencement of negotiations for future employment or compensation or of an agreement for future employment or compensation; (8) to a Member of Congress or a congressional office in response to an inquiry made on behalf of and at the request of an individual who is the subject of the record; (9) to contractors and other non-Government employees working on a contract, service or assignment for the Federal Government when necessary to accomplish a function related to this system of records; (10) on the OGE Website and to any person, department or agency, any written ethics agreement, including certifications of ethics agreement compliance, filed with OGE by an individual nominated by the President to a position requiring Senate confirmation; (11) on the OGE Website and to any person, department or agency, any certificate of divestiture issued by OGE; (12) on the OGE Website and to any person, department or agency, any waiver of the restrictions contained in Executive Order 13989 or any superseding executive order; (13) to appropriate agencies, entities and persons when there has been a suspected or confirmed breach of the system of records, the agency maintaining the records has determined that there is a risk of harm to individuals, the agency, the Federal Government, or national security, and the disclosure is reasonably necessary to assist in connection with the agency's efforts to respond to the suspected or confirmed breach or to prevent, minimize, or remedy such harm; and (14) to another Federal agency or Federal entity, when the agency maintaining the record determines that information from this system of records is reasonably necessary to assist the recipient agency or entity in responding to a suspected or confirmed breach or in preventing, minimizing, or remedying the risk of harm to individuals, the recipient agency or entity, the Federal Government, or national security. See also the OGE/GOVT-1 executive branch-wide Privacy Act system of records.

Public Burden Information

This collection of information is estimated to take an average of ten hours per response, including time for reviewing the instructions, gathering the data needed, and completing the form. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Program Counsel, U.S. Office of Government Ethics (OGE) 250 E Street, S.W., Suite 750, Washington, DC 20024-3249.

Pursuant to the Paperwork Reduction Act, as amended, an agency may not conduct or sponsor, and no person is required to respond to, a collection of information unless it displays a currently valid OMB (that control number 3209-0001, is displayed here and at the top of the first page of this OGE Form 278e).