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| Report Type: | Candidate |
| Year (Annual Report only): | 2020 |
| Date of Appointment/Termination: | |

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

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|--|------------|----|-------------------------|--------|
| Filer's Information | | | | |
| Last Name | First Name | MI | Position | Agency |
| BIDEN, JR. | JOSEPH | R. | CANDIDATE FOR PRESIDENT | |
| Other Federal Government Positions Held During the Preceding 12 Months: | | | | |
| Name of Congressional Committee Considering Nomination (Nominees only): | | | | |
| Filer's Certification - I certify that the statements I have made in this report are true, complete and correct to the best of my knowledge: | | | | |
| Signature: | | | Date: May 15, 2020 | |
| 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) | | | | |
| Signature: Lisa J. Stevenson <small>Digitally signed by Lisa J. Stevenson Date: 2020.05.15 17:21:47 -04'00'</small> | | | Date: | |
| Other Review Conducted By: | | | | |
| Signature: Tracey L. Ligon <small>Digitally signed by Tracey L. Ligon Date: 2020.05.15 16:01:24 -04'00'</small> | | | Date: | |
| U.S. Office of Government Ethics Certification (if required): | | | | |
| Signature: EMORY ROUNDS <small>Digitally signed by EMORY ROUNDS Date: 2020.05.19 16:42:37 -04'00'</small> | | | Date: | |

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| Comments of Reviewing Officials: |
| Reviewed for Apparent Compliance with the Federal Election Campaign Act |

[Instructions for Part 1](#)

Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.

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|----------------------|-------------|
| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 2 of 11 |

Part 1: Filer's Positions Held Outside United States Government

| # | Organization Name | City/State | Organization Type | Position Held | From | To |
|-----|----------------------------|------------------|--------------------|---|--------|---------|
| 1. | CelticCapri Corp | Wilmington, DE | S-Corporation | President | 2/2017 | Present |
| 2. | University of Pennsylvania | Philadelphia, PA | Private University | Benjamin Franklin Presidential Practice Professor (unpaid leave of absence since April 2019) | 2/2017 | Present |
| 3. | Biden Cancer Initiative | Washington, D.C. | Non-Profit Entity | Member of the Board (all times listed); Chair of the Board (May 2017 - June 2017); Co-Chair of the Board (June 2017 - April 2019) | 5/2017 | 4/2019 |
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[Instructions for Part 2](#)

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|----------------------|-------------|
| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 3 of 11 |

Part 2: Filer's Employment Assets & Income and Retirement Accounts

| # | Description | EIF | Value | Income Type | Income Amount |
|-----|--|-----|-----------------------|------------------------|---------------------------|
| 1. | CelticCapri Corp | N/A | | salary | \$112,500 |
| 2. | University of Pennsylvania | N/A | | salary | \$135,116 |
| 3. | IRA #1: | No | | cash distributions | \$943 |
| 4. | - U.S. brokerage account (cash) | N/A | \$15,001 - \$50,000 | | None (or less than \$201) |
| 5. | TIAA-CREF Lifecycle Index 2010 Fund | Yes | \$15,001 - \$50,000 | | None (or less than \$201) |
| 6. | "Promises to Keep," Random House Publishers (value not readily ascertainable) | N/A | | | None (or less than \$201) |
| 7. | "Promise Me, Dad," Macmillan Publishers (value not readily ascertainable) | N/A | | | None (or less than \$201) |
| 8. | CelticCapri Corp, S-Corp (speaking and writing engagements) | N/A | \$250,001 - \$500,000 | net distributive share | \$50,014 |
| 9. | -Speaking Engagement -- Phoenix, AZ, 11/30/18 (payment made by Eminent Series Group, LLC) (payment made in 2019) | N/A | | honorarium | \$181,000 |
| 10. | - Speaking Engagement -- Theatre at Grand Prairie (TX), 12/4/18 (payment made by AEG Presents) (payment made in 2019) | N/A | | honorarium | \$42,648 |
| 11. | - Speaking Engagement -- Brown Lecture Board (payment made by Brown University), Providence, RI, 12/10/18 (payment made in 2019) | N/A | | honorarium | \$92,642 |
| 12. | - Speaking Engagement -- Fort Lauderdale, FL, 1/28/19 (payment made by Performing Arts Center Authority) | N/A | | honorarium | \$134,933 |
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[Instructions for Part 3](#)

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|----------------------|-------------|
| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 4 of 11 |

Part 3: Filer's Employment Agreements and Arrangements

| # | Employer or Party | City/State | Status and Terms | Date |
|-----|----------------------------|------------------|---|--------|
| 1. | University of Pennsylvania | Philadelphia, PA | Unpaid leave of absence from University position | 4/2019 |
| 2. | University of Pennsylvania | Philadelphia, PA | Continued participation in University's defined contribution plan (described in line 5 of Part 2). The University will not make further contributions during leave. | 2/2017 |
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[Instructions for Part 4](#)

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| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 5 of 11 |

Part 4: Filer's Sources of Compensation Exceeding \$5,000 in a Year

| # | Source Name | City/State | Brief Description of Duties |
|-----|----------------|------------|-----------------------------|
| 1. | Not applicable | | |
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Instructions for Part 5

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| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 6 of 11 |

Part 5: Spouse's Employment Assets & Income and Retirement Accounts

| # | Description | EIF | Value | Income Type | Income Amount |
|-----|--|-----|-----------------------|---------------------|---------------------------|
| 1. | Giacoppa Corp | N/A | | salary | |
| 2. | Northern Virginia Community College | N/A | | salary | |
| 3. | DE Retirement System, 457 plan (no remaining assets) | N/A | | cash distribution | \$44,785 |
| 4. | DE Retirement System. 401a plan (no remaining assets) | N/A | | cash distribution | \$2,813 |
| 5. | DE Office of Pensions, defined benefit plan (value not readily ascertainable) | N/A | | retirement payments | |
| 6. | VA Retirement System, 457 plan: | No | | | |
| 7. | - Target Date 2025 Portfolio | Yes | \$15,001 - \$50,000 | | None (or less than \$201) |
| 8. | VA Retirement System, 401a plan: | No | | | |
| 9. | - Target Date 2025 Portfolio | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 10. | VA Retirement System, defined benefit plan | N/A | \$50,001 - \$100,000 | | None (or less than \$201) |
| 11. | "Don't Forget, God Bless Our Troops" (value not readily ascertainable) ---- Simon & Schuster Children's Publishing, publisher. | N/A | | | None (or less than \$201) |
| 12. | "Where the Light Enters" (value not readily ascertainable) -- Macmillan Publishers, publisher | N/A | | | None (or less than \$201) |
| 13. | "JOEY-- The Story of Joe Biden" (value not readily ascertainable) ---- Simon & Schuster, publisher | N/A | | | None (or less than \$201) |
| 14. | Giacoppa Corp, S-Corp (speaking and writing engagements) | N/A | \$100,001 - \$250,000 | business income | |
| 15. | - "Where the Light Enters", Macmillan Publishers | N/A | | advance | |
| 16. | -"JOEY-- The Story of Joe Biden," Simon & Schuster | N/A | | advance | |
| 17. | - Speaking Engagement -- SAP North America, Newtown Square, PA, 11/26/18 (payment made by SAP America Inc.) (payment made in 2019) | N/A | | honorarium | \$45,948 |
| 18. | - Speaking Engagement --San Antonio, TX, 4/5/19 (payment made by Junior League of San Antonio) | N/A | | honorarium | \$37,048 |
| 19. | - Speaking Engagement -- Phoenix, AZ, 5/10/19 (payment made by the Sandra Day O'Connor Institute) | N/A | | honorarium | \$25,367 |

Instructions for Part 6

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| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 7 of 11 |

Part 6: Other Assets and Income

| # | Description | EIF | Value | Income Type | Income Amount |
|-----|---|-----|-------------------------|-------------|---------------------------|
| 1. | United States Senate FCU (cash) | N/A | \$1,001 - \$15,000 | interest | None (or less than \$201) |
| 2. | M&T Bank (cash) | N/A | \$500,001 - \$1,000,000 | interest | \$201 - \$1,000 |
| 3. | Wilmington Savings and Fund Society (cash) | N/A | \$250,001 - \$500,000 | interest | \$1,001 - \$2,500 |
| 4. | PNC Bank (cash) | N/A | \$100,001 - \$250,000 | interest | \$201 - \$1,000 |
| 5. | New Castle County Schools Employee FCU (cash) | N/A | \$1,001 - \$15,000 | interest | None (or less than \$201) |
| 6. | TD Bank (cash) | N/A | \$100,001 - \$250,000 | interest | None (or less than \$201) |
| 7. | Security Benefit Group, variable annuity | No | | | |
| 8. | - Invesco VI Health Care | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 9. | - BNY Mellon IP Technology Growth | Yes | \$15,001 - \$50,000 | | None (or less than \$201) |
| 10. | - Guggenheim VIF High Yield | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 11. | - Janus Hend VIT Enterprise | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 12. | - Janus Hend VIT Research | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 13. | - Western Asset Variable Global High Yield Bond | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 14. | - MFS VIT Utilities | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 15. | - Guggenheim VIF Styleplus Mid Growth | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 16. | - Guggenheim VIF S-Mid Cap Value | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 17. | - Guggenheim VIF Small Cap Value | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 18. | - Guggenheim VIF All Cap Value | Yes | \$1,001 - \$15,000 | | None (or less than \$201) |
| 19. | Mass Mutual, whole life | N/A | \$1,001 - \$15,000 | | None (or less than \$201) |

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| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 8 of 11 |

Part 6: Other Assets and Income

| # | Description | EIF | Value | Income Type | Income Amount |
|-----|-------------------------|-----|---------------------|-------------|---------------------------|
| 20. | Mass Mutual, whole life | N/A | \$1,001 - \$15,000 | | None (or less than \$201) |
| 21. | Mass Mutual, whole life | N/A | \$1,001 - \$15,000 | | None (or less than \$201) |
| 22. | Mass Mutual, whole life | N/A | \$15,001 - \$50,000 | | None (or less than \$201) |
| 23. | Mass Mutual, whole life | N/A | \$15,001 - \$50,000 | | None (or less than \$201) |
| 24. | Mass Mutual, whole life | N/A | \$15,001 - \$50,000 | | None (or less than \$201) |
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[Instructions for Part 7](#)

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| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 9 of 11 |

Part 7: Transactions

| # | Description | Type | Date | Amount |
|-----|----------------|------|------|--------|
| 1. | Not applicable | | | |
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[Instructions for Part 8](#)

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| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 10 of 11 |

Part 8: Liabilities

| # | Creditor Name | Type | Amount | Year Incurred | Rate | Term |
|-----|-----------------|--------------------------------------|---------------------|---------------|------|------------|
| 1. | Mass Mutual | Loans against cash value of policies | \$15,001 - \$50,000 | 1983 | 5-8% | open-ended |
| 2. | Oceanfirst Bank | Term loan | \$15,001 - \$50,000 | 2018 | 6.5% | 10 years |
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[Instructions for Part 9](#)

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| Filer's Name | Page Number |
| Joseph R. Biden, Jr. | 11 of 11 |

Part 9: Gifts and Travel Reimbursements

| # | Source Name | City/State | Brief Description | Value |
|-----|----------------|------------|-------------------|-------|
| 1. | Not applicable | | | |
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