Executive Branch Personnel

Public Financial Disclosure Report (OGE Form 278e)

Filer's Information

Leach, Jennifer

Associate Director, Consumer & Business Education, Bur. of Cons. Protection, Federal Trade Commission

Report Year: 2022

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/ Leach, Jennifer [electronically signed on 05/07/2022 by Leach, Jennifer 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/ Bannon, Craig, Certifying Official [electronically signed on 06/30/2022 by Bannon, Craig in Integrity.gov]

Other review conducted by
/s/ Bannon, Craig, Ethics Official [electronically signed on 06/30/2022 by Bannon, Craig in Integrity.gov]

U.S. Office of Government Ethics Certification

Data Revised 06/30/2022

Data Revised 06/29/2022

Data Revised 06/28/2022

Data Revised 06/27/2022

Comments of Reviewing Officials (public annotations):

PART	#	REFERENCE	COMMENT
N/A	N/A	General	(06/29/2022, Bannon, Craig): The prior annual report filed in 2021 (covering the 2020 reporting period) mistakenly reported the T. Rowe Price Mid-Cap Growth Fund (RPTIX) in the filer's IRA (part 2, line 1.9) with a value of $1k-$15k. The value (as of 12/30/20) should have been reported as "None (or less than $1,001)." There were no reportable transactions for this asset in 2021.

1. Filer's Positions Held Outside United States Government

None

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	IRA	No			
1.1	Vanguard Intermediate Term Bond ETF (BIV)	Yes	$1,001 - $15,000		None (or less than $201)
1.2	iShares MSCI EAFE Value ETF (EFV)	Yes	$1,001 - $15,000		None (or less than $201)
1.3	Vanguard Mid-Cap Index Fund ETF Shares (VO)	Yes	$1,001 - $15,000		None (or less than $201)
1.4	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	Yes	$15,001 - $50,000		None (or less than $201)
1.5	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO)	Yes	$1,001 - $15,000		None (or less than $201)
1.6	Vanguard Value Index Fund ETF Shares (VTV)	Yes	$15,001 - $50,000		None (or less than $201)
1.7	Akre Focus Fund Institutional Class Shares (AKRIX)	Yes	$15,001 - $50,000		None (or less than $201)
1.8	Guggenheim Total Return Bond Fund Institutional Class Shares (GIBIX)	Yes	$1,001 - $15,000		None (or less than $201)
1.9	Edgewood Growth Fund Institutional Class Shares (EGFIX)	Yes	$15,001 - $50,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.10	Goldman Sachs GQG Partners International Opportunities Fund Institutional Class Shs (GSIMX)		Yes	$1,001 - $15,000		None (or less than $201)
1.11	John Hancock Funds III International Growth Fund Class I Shares (GOGIX)	See Endnote	Yes	$15,001 - $50,000		None (or less than $201)
1.12	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)		Yes	$15,001 - $50,000		None (or less than $201)
1.13	Loomis Sayles Core Plus Bond Fund Class N Shares (NERNX)		Yes	$1,001 - $15,000		None (or less than $201)
1.14	Brown Capital Management International Small Company Fund Inst Shares (BCSFX)		Yes	$1,001 - $15,000		None (or less than $201)
1.15	Brown Capital Management Small Company Fund Institutional Share (BCSSX)		Yes	$1,001 - $15,000		None (or less than $201)
1.16	PIMCO International Bond Fund (Unhedged) Institutional Class Shares (PFUIX)		Yes	$1,001 - $15,000		None (or less than $201)
1.17	PIMCO Income Fund Institutional Class Shares (PIMIX)		Yes	$1,001 - $15,000		None (or less than $201)
1.18	T Rowe Price Blue Chip Growth Fund, Inc Class I Shares (TBCIX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
1.19	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX)		Yes	$1,001 - $15,000		None (or less than $201)
1.20	Artisan International Small-Mid Fund Institutional Shares (APHJX)		Yes	$1,001 - $15,000		None (or less than $201)
1.21	Artisan International Value Fund Institutional Shares (APHKX)		Yes	$15,001 - $50,000		None (or less than $201)
1.22	Western Asset Core Plus Bond Fund Class I Shares (WACPX)		Yes	$1,001 - $15,000		None (or less than $201)
2	AARP, defined benefit plan (value not readily ascertainable) Approximately $11,500 annually at age 65		N/A			None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3	Beneficiary IRA		No		cash distributions	$3,327
3.1	Vanguard Intermediate Term Bond ETF (BIV)		Yes	$1,001 - $15,000		None (or less than $201)
3.2	iShares MSCI EAFE Value ETF (EFV)		Yes	$1,001 - $15,000		None (or less than $201)
3.3	Vanguard Mid-Cap Index Fund ETF Shares (VO)		Yes	$1,001 - $15,000		None (or less than $201)
3.4	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)		Yes	$1,001 - $15,000		None (or less than $201)
3.5	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO)		Yes	$1,001 - $15,000		None (or less than $201)
3.6	Vanguard Value Index Fund ETF Shares (VTV)		Yes	$1,001 - $15,000		None (or less than $201)
3.7	Akre Focus Fund Institutional Class Shares (AKRIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.8	Guggenheim Total Return Bond Fund Institutional Class Shares (GIBIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.9	Edgewood Growth Fund Institutional Class Shares (EGFIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.10	Goldman Sachs GQG Partners International Opportunities Fund Institutional Class Shs (GSIMX)		Yes	$1,001 - $15,000		None (or less than $201)
3.11	John Hancock Funds III International Growth Fund Class I Shares (GOGIX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
3.12	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.13	Loomis Sayles Core Plus Bond Fund Class N Shares (NERNX)		Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3.14	Brown Capital Management International Small Company Fund Inst Shares (BCSFX)		Yes	$1,001 - $15,000		None (or less than $201)
3.15	Brown Capital Management Small Company Fund Institutional Share (BCSSX)		Yes	$1,001 - $15,000		None (or less than $201)
3.16	PIMCO International Bond Fund (Unhedged) Institutional Class Shares (PFUIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.17	PIMCO Income Fund Institutional Class Shares (PIMIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.18	T Rowe Price Blue Chip Growth Fund, Inc Class I Shares (TBCIX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
3.19	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.20	Artisan International Small-Mid Fund Institutional Shares (APHJX)		Yes	$1,001 - $15,000		None (or less than $201)
3.21	Artisan International Value Fund Institutional Shares (APHKX)		Yes	$1,001 - $15,000		None (or less than $201)
3.22	Western Asset Core Plus Bond Fund Class I Shares (WACPX)		Yes	$1,001 - $15,000		None (or less than $201)

3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	AARP	Washington, District of Columbia	I will continue to participate in this defined benefit plan.	1/2000

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

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

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Sirius XM Holdings, Inc. (SIRI)	N/A		Salary	
2	IRA	No			
2.1	iShares MSCI EAFE Value ETF (EFV)	Yes	$1,001 - $15,000		None (or less than $201)
2.2	Vanguard Intermediate-Term Bond Index Fund ETF Shares (BIV)	Yes	$1,001 - $15,000		None (or less than $201)
2.3	Vanguard Mid-Cap Index Fund ETF Shares (VO)	Yes	$1,001 - $15,000		None (or less than $201)
2.4	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	Yes	$15,001 - $50,000		None (or less than $201)
2.5	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO)	Yes	$1,001 - $15,000		None (or less than $201)
2.6	Vanguard Value Index Fund ETF Shares (VTV)	Yes	$15,001 - $50,000		None (or less than $201)
2.7	Akre Focus Fund Institutional Class Shares (AKRIX)	Yes	$15,001 - $50,000		None (or less than $201)
2.8	Guggenheim Total Return Bond Fund Institutional Class Shares (GIBIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.9	Edgewood Growth Fund Institutional Class Shares (EGFIX)	Yes	$15,001 - $50,000		None (or less than $201)
2.10	Goldman Sachs GQG Partners International Opportunities Fund Institutional Class Shs (GSIMX)	Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.11	John Hancock Funds III International Growth Fund Class I Shares (GOGIX)	Yes	$15,001 - $50,000		None (or less than $201)
2.12	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.13	Loomis Sayles Core Plus Bond Fund Class N Shares (NERNX)	Yes	$1,001 - $15,000		None (or less than $201)
2.14	Brown Capital Management International Small Company Fund Inst Shares (BCSFX)	Yes	$1,001 - $15,000		None (or less than $201)
2.15	Brown Capital Management Small Company Fund Institutional Share (BCSSX)	Yes	$1,001 - $15,000		None (or less than $201)
2.16	PIMCO International Bond Fund (Unhedged) Institutional Class Shares (PFUIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.17	PIMCO Income Fund Institutional Class Shares (PIMIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.18	T Rowe Price Blue Chip Growth Fund, Inc Class I Shares (TBCIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.19	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.20	Artisan International Small-Mid Fund Institutional Shares (APHJX)	Yes	$1,001 - $15,000		None (or less than $201)
2.21	Artisan International Value Fund Institutional Shares (APHKX)	Yes	$15,001 - $50,000		None (or less than $201)
2.22	Western Asset Core Plus Bond Fund Class I Shares (WACPX)	Yes	$1,001 - $15,000		None (or less than $201)
3	Sirius XM Holdings, Inc., 401(k)	No			
3.1	JPMorgan Large Cap Growth Fund Class R6 Shares (JLGMX)	Yes	$15,001 - $50,000		None (or less than $201)
4	TekSystems 401(k)	No			

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
4.1	Northern Funds Stock Index Fund (NOSIX)	Yes	$15,001 - $50,000		None (or less than $201)
5	Sirius XM Holdings, Inc. (SIRI), unvested restricted stock units	N/A	$15,001 - $50,000		None (or less than $201)

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	U.S. bank account #1 (cash)	N/A	$50,001 - $100,000	Interest	$201 - $1,000

7. Transactions

#	DESCRIPTION		TYPE	DATE	AMOUNT
1	Akre Focus Fund (AKRIX)	See Endnote	Purchase	04/23/2021	$1,001 - $15,000
2	Akre Focus Fund (AKRIX)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
3	Edgewood Growth Fund (EGFIX)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000
4	Edgewood Growth Fund (EGFIX)	See Endnote	Purchase	04/23/2021	$1,001 - $15,000
5	Edgewood Growth Fund (EGFIX)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
6	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)	See Endnote	Purchase	04/26/2021	$1,001 - $15,000
7	PIMCO Income Fund Institutional Class Shares (PIMIX)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000
8	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000

#	DESCRIPTION		TYPE	DATE	AMOUNT
9	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000
10	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	See Endnote	Purchase	04/23/2021	$1,001 - $15,000
11	Vanguard Value Index Fund ETF Shares (VTV)	See Endnote	Purchase	04/23/2021	$1,001 - $15,000
12	Guggenheim Total Return Bond Fund Institutional Class Shares (GIBIX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
13	FPA New Income, Inc (FPNIX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
14	FPA New Income, Inc (FPNIX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
15	Washington Mutual Investors Fund Class F2 Shares (WMFFX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
16	Invesco Oppenheimer International Bond Fund Class R6 Shares (OIBIX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
17	Invesco Oppenheimer International Bond Fund Class R6 Shares (OIBIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
18	Invesco Oppenheimer International Bond Fund Class R6 Shares (OIBIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
19	Loomis Sayles Core Plus Bond Fund Class N Shares (NERNX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
20	Principal MidCap Fund Institutional Class Shares (PCBIX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
21	Principal MidCap Fund Institutional Class Shares (PCBIX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
22	JPMorgan Small Cap Equity Fund Class I Shares (VSEIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
23	JPMorgan Small Cap Equity Fund Class I Shares (VSEIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000

#	DESCRIPTION		TYPE	DATE	AMOUNT
24	JPMorgan Small Cap Equity Fund Class I Shares (VSEIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
25	PIMCO Income Fund Institutional Class Shares (PIMIX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
26	PIMCO Income Fund Institutional Class Shares (PIMIX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
27	PIMCO Income Fund Institutional Class Shares (PIMIX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
28	PRIMECAP Odyssey Aggressive Growth Fund (POAGX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
29	Artisan International Small-Mid Fund Institutional Shares (APHJX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
30	Artisan International Small-Mid Fund Institutional Shares (APHJX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
31	Artisan International Value Fund Institutional Shares (APHKX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
32	Vanguard Intermediate-Term Bond Index Fund ETF Shares (BIV)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
33	Western Asset Core Plus Bond Fund Class I Shares (WACPX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
34	Western Asset Core Plus Bond Fund Class I Shares (WACPX)	See Endnote	Sale	04/23/2021	$1,001 - $15,000
35	Edgewood Growth Fund Institutional Class Shares (EGFIX)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
36	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000
37	PIMCO Income Fund Institutional Class Shares (PIMIX)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000
38	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000

#	DESCRIPTION		TYPE	DATE	AMOUNT
39	Washington Mutual Investors Fund Class F2 Shares (WMFFX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
40	Invesco Oppenheimer International Bond Fund Class R6 Shares (OIBIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
41	Principal MidCap Fund Institutional Class Shares (PCBIX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
42	Principal MidCap Fund Institutional Class Shares (PCBIX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
43	JPMorgan Small Cap Equity Fund Class I Shares (VSEIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
44	PRIMECAP Odyssey Aggressive Growth Fund (POAGX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
45	Akre Focus Fund Institutional Class Shares (AKRIX)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
46	Edgewood Growth Fund Institutional Class Shares (EGFIX)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
47	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000
48	PIMCO Income Fund Institutional Class Shares (PIMIX)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000
49	PIMCO Income Fund Institutional Class Shares (PIMIX)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
50	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX)	See Endnote	Purchase	01/20/2021	$1,001 - $15,000
51	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	See Endnote	Purchase	01/20/2021	$15,001 - $50,000
52	Western Asset Core Plus Bond Fund Class I Shares (WACPX)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
53	Washington Mutual Investors Fund Class F2 Shares (WMFFX)	See Endnote	Sale	01/20/2021	$15,001 - $50,000

#	DESCRIPTION		TYPE	DATE	AMOUNT
54	Invesco Oppenheimer International Bond Fund Class R6 Shares (OIBIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
55	Principal MidCap Fund Institutional Class Shares (PCBIX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
56	Principal MidCap Fund Institutional Class Shares (PCBIX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
57	Principal MidCap Fund Institutional Class Shares (PCBIX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
58	Principal MidCap Fund Institutional Class Shares (PCBIX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
59	JPMorgan Small Cap Equity Fund Class I Shares (VSEIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
60	JPMorgan Small Cap Equity Fund Class I Shares (VSEIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
61	JPMorgan Small Cap Equity Fund Class I Shares (VSEIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
62	JPMorgan Small Cap Equity Fund Class I Shares (VSEIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
63	PRIMECAP Odyssey Aggressive Growth Fund (POAGX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
64	T Rowe Price Blue Chip Growth Fund, Inc Class I Shares (TBCIX)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
65	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
66	Vanguard Value Index Fund ETF Shares (VTV)	See Endnote	Sale	08/23/2021	$1,001 - $15,000
67	Western Asset Core Plus Bond Fund Class I Shares (WACPX)	See Endnote	Sale	01/20/2021	$1,001 - $15,000
68	Vanguard Mid-Cap Index Fund ETF Shares (VO)	See Endnote	Purchase	01/22/2021	$1,001 - $15,000

#	DESCRIPTION		TYPE	DATE	AMOUNT
69	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
70	PIMCO International Bond Fund (Unhedged) Institutional Class Shares (PFUIX)	See Endnote	Purchase	08/24/2021	$1,001 - $15,000
71	Vanguard Mid-Cap Index Fund ETF Shares (VO)	See Endnote	Purchase	01/22/2021	$1,001 - $15,000
72	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
73	PIMCO International Bond Fund (Unhedged) Institutional Class Shares (PFUIX)	See Endnote	Purchase	08/24/2021	$1,001 - $15,000
74	Vanguard Mid-Cap Index Fund ETF Shares (VO)	See Endnote	Purchase	01/22/2021	$1,001 - $15,000
75	Vanguard Mid-Cap Index Fund ETF Shares (VO)	See Endnote	Purchase	04/23/2021	$1,001 - $15,000
76	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO)	See Endnote	Purchase	08/23/2021	$1,001 - $15,000
77	PIMCO International Bond Fund (Unhedged) Institutional Class Shares (PFUIX)	See Endnote	Purchase	08/24/2021	$1,001 - $15,000

8. Liabilities

None

9. Gifts and Travel Reimbursements

None

Endnotes

PART	#	ENDNOTE
2.	1.11	The prior annual report filed in 2021 (covering the 2020 reporting period) mistakenly omitted this asset from the filer's IRA. There were no transactions for this asset (in filer's IRA) during 2021 that were reportable for this annual report filed in 2022.
2.	1.18	The prior annual report filed in 2021 mistakenly included duplicate entries (part 2, lines 1.10 and 1.24) for this asset. This current report removed the duplicate entry.
2.	3.11	The prior annual report filed in 2021 (covering the 2020 reporting period) mistakenly omitted this asset from the filer's Bene IRA. There were no transactions for this asset (in filer's Bene IRA) during 2021 that were reportable for this annual report filed in 2022.
2.	3.18	The prior annual report filed in 2021 mistakenly included duplicate entries (part 2, lines 3.10 and 3.23) for this asset. This current report removed the duplicate entry.
7.	1	spouse's IRA
7.	2	spouse's IRA
7.	3	spouse's IRA
7.	4	spouse's IRA
7.	5	spouse's IRA
7.	6	spouse's IRA
7.	7	spouse's IRA
7.	8	spouse's IRA
7.	9	spouse's IRA
7.	10	spouse's IRA
7.	11	spouse's IRA
7.	12	spouse's IRA
7.	13	spouse's IRA
7.	14	spouse's IRA

PART	#	ENDNOTE
7.	15	spouse's IRA
7.	16	spouse's IRA
7.	17	spouse's IRA
7.	18	spouse's IRA
7.	19	spouse's IRA
7.	20	spouse's IRA
7.	21	spouse's IRA
7.	22	spouse's IRA
7.	23	spouse's IRA
7.	24	spouse's IRA
7.	25	spouse's IRA
7.	26	spouse's IRA
7.	27	spouse's IRA
7.	28	spouse's IRA
7.	29	spouse's IRA
7.	30	spouse's IRA
7.	31	spouse's IRA
7.	32	spouse's IRA
7.	33	spouse's IRA
7.	34	spouse's IRA
7.	35	Bene IRA
7.	36	Bene IRA

PART	#	ENDNOTE
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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 (limitations apply for PAS filers); (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 $415 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.
- Travel reimbursements totaling more than $415 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 $166 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

Title I of the Ethics in Government Act of 1978, as amended (the Act), 5 U.S.C. app. § 101 et seq., as amended by the Stop Trading on Congressional Knowledge Act of 2012 (Pub. L. 112-105) (STOCK Act), 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 sections 105 and 402(b)(1) of the Act 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 13770 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) Suite 500, 1201 New York Avenue, N.W., Washington, DC 20005-3917.

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 control number (that number, 3209-0001, is displayed here and at the top of the first page of this OGE Form 278e).
