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

Filer's Information

Monaco, Lisa O

Deputy Attorney General, United States Department of Justice, Department of Justice

Report Year: 2024

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/ Monaco, Lisa O [electronically signed on 05/14/2024 by Monaco, Lisa O 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/ Mizer, Benjamin, Certifying Official [electronically signed on 05/29/2024 by Mizer, Benjamin in Integrity.gov]

Other review conducted by
/s/ Tirrell, Joseph W, Ethics Official [electronically signed on 05/28/2024 by Tirrell, Joseph W in Integrity.gov]

U.S. Office of Government Ethics Certification
/s/ Granahan, Megan, Certifying Official [electronically signed on 07/12/2024 by Granahan, Megan in Integrity.gov]

Data Revised 05/28/2024

Comments of Reviewing Officials (public annotations):

PART	#	REFERENCE	COMMENT
N/A	N/A	General	(05/28/2024, Felter, Monica): No conflicts noted.

1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME		CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	LOM Strategies, LLC	See Endnote	Washington, District of Columbia	Corporation	Manager	3/2017	Present

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Line Intentionally Left Blank				
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5	New York University TIAA Retirement	No			
5.1	Vanguard Institutional Target Retirement 2035 Fund Institutional Class Shares (VITFX)	Yes	$50,001 - $100,000		None (or less than $201)
6	O'Melveny & Myers LLP 401(k)	No			
6.1	Fidelity Freedom Index 2030 Fund Investor Class Shares (FXIFX)	Yes	$100,001 - $250,000		None (or less than $201)
7	Line Intentionally Left Blank				
8	LOM Strategies, LLC (security consulting, value reflects U.S. bank cash account)	No	$250,001 - $500,000		None (or less than $201)
9	IRA	No			

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
9.1	Alger Small Cap Focus Fund Class Z Shares (AGOZX)	Yes	$15,001 - $50,000		None (or less than $201)
9.2	GQG PartnersEmerging Markets Equity Fund Institutional Class Shares (GQGIX)	Yes	$15,001 - $50,000		None (or less than $201)
9.3	iShares Core S&P Mid-Cap ETF (IJH)	Yes	$15,001 - $50,000		None (or less than $201)
9.4	iShares Core S&P Small-Cap ETF (IJR)	Yes	$15,001 - $50,000		None (or less than $201)
9.5	Janus Henderson Enterprise Fund Class I Shares (JMGRX)	Yes	$15,001 - $50,000		None (or less than $201)
9.6	John Hancock Funds III International Growth Fund Class I Shares (GOGIX)	Yes	$15,001 - $50,000		None (or less than $201)
9.7	JPMorgan Global Allocation Fund Class I Shares (GAOSX)	Yes	$50,001 - $100,000		None (or less than $201)
9.8	Loomis Sayles Growth Fund Class Y Shares (LSGRX)	Yes	$100,001 - $250,000		None (or less than $201)
9.9	Line Intentionally Left Blank				
9.10	Line Intentionally Left Blank				
9.11	Line Intentionally Left Blank				
9.12	Smead Value Fund Class I1 Shares (SVFFX)	Yes	$100,001 - $250,000		None (or less than $201)
9.13	SPDR Portfolio S&P 500 Growth ETF (SPYG)	Yes	$50,001 - $100,000		None (or less than $201)
9.14	T Rowe Price Dividend Growth Fund, Inc. (PRDGX)	Yes	$100,001 - $250,000		None (or less than $201)
9.15	Touchstone Sands CapitalEmerging Markets Growth Fund Class Y Shares (TSEMX)	Yes	$1,001 - $15,000		None (or less than $201)
9.16	Line Intentionally Left Blank				

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
9.17	ALLSPRING SPECIAL SMALL CAP VALUE FUND (ESPNX)	Yes	$15,001 - $50,000		None (or less than $201)
9.18	US bank (Cash)	N/A	$1,001 - $15,000		None (or less than $201)
9.19	NEUBERGER BERMAN LARGE CAP VALUE FUND CL INSTL (NBPIX)	Yes	$50,001 - $100,000		None (or less than $201)
9.20	ISHARES CORE S&P US VALUE ETF (IUSV)	Yes	$1,001 - $15,000		None (or less than $201)
9.21	Line Intentionally Left Blank				
9.22	ALPS SMITH TOTAL RETURN (SMTHX)	Yes	$15,001 - $50,000		None (or less than $201)
9.23	ARTISAN INTERNATIONAL (APDKX)	Yes	$15,001 - $50,000		None (or less than $201)
9.24	JPMORGAN CORE BOND FD (WOBDX)	Yes	$15,001 - $50,000		None (or less than $201)
9.25	PACER US CASH COWS100 (COWZ)	Yes	$15,001 - $50,000		None (or less than $201)
9.26	PIMCO INCOME FUND CL I2 (PONPX)	Yes	$15,001 - $50,000		None (or less than $201)
10	SEP IRA	No			
10.1	US bank (Cash)	N/A	$1,001 - $15,000		None (or less than $201)
10.2	ISH TR CORE DIVID GROWTH ETF (DGRO)	Yes	$15,001 - $50,000		None (or less than $201)
10.3	SPDR Portfolio S&P 500 ETF (SPLG)	Yes	$50,001 - $100,000		None (or less than $201)
10.4	SPDR PORTFOLIO S&P 400 MID CAP ETF (SPMD)	Yes	$15,001 - $50,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
10.5	SPDR PORTFOLIO EMERGING MARKETS ETF (SPEM)	Yes	$1,001 - $15,000		None (or less than $201)
10.6	SPDR PORTFOLIO S&P 600 SMALL CAP ETF (SPSM)	Yes	$15,001 - $50,000		None (or less than $201)
10.7	VANGUARD WORLD FD SHS ESG US STOCK ETF (ESGV)	Yes	$50,001 - $100,000		None (or less than $201)
10.8	VANGUARD WORLD FD SHS ESG INTERNATIONAL STOCK ETF (VSGX)	Yes	$15,001 - $50,000		None (or less than $201)
10.9	WISDOMTREE EMERGING MARK (XSOE)	Yes	$1,001 - $15,000		None (or less than $201)
10.10	Line Intentionally Left Blank				
10.11	ISHARES CORE S&P US VALUE ETF (IUSV)	Yes	$15,001 - $50,000		None (or less than $201)
10.12	ISHARES ESG AWARE MSCI EAFE ETF (ESGD)	Yes	$1,001 - $15,000		None (or less than $201)
10.13	Line Intentionally Left Blank				
10.14	ALPS SMITH TOTAL RETURN (SMTHX)	Yes	$15,001 - $50,000		None (or less than $201)
10.15	JPMORGAN CORE BOND FD (WOBDX)	Yes	$15,001 - $50,000		None (or less than $201)
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3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	New York University School of Law	New York, New York	I continue to be a beneficiary of this defined contribution plan. The plan sponsor will not make further contributions after my separation.	2/2017
2	O'Melveny & Myers LLP	Washington, District of Columbia	I continue to be a beneficiary of this defined contribution plan. The plan sponsor will not make further contributions after my separation.	3/2019
3	LOM Strategies LLC	Washington, District of Columbia	My consulting business continues to be inactive during my appointment.	2/2021

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

None

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Brokerage account #1	No			
1.1	Line Intentionally Left Blank				
1.2	Line Intentionally Left Blank				
1.3	Line Intentionally Left Blank				
1.4	Line Intentionally Left Blank				

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.5	Line Intentionally Left Blank				
1.6	Line Intentionally Left Blank				
1.7	Industrial Select Sector SPDR Fund (XLI)	Yes	$1,001 - $15,000		$201 - $1,000
1.8	Technology Select Sector SPDR Fund (XLK)	Yes	$15,001 - $50,000		None (or less than $201)
1.9	Line Intentionally Left Blank				
1.10	Line Intentionally Left Blank				
1.11	Vanguard Pacific Stock Index FundVanguard FTSEPacific ETF Shares (VPL)	Yes	$1,001 - $15,000		None (or less than $201)
1.12	Vanguard FTSE All-World ex US Index Fund ETF Shares (VEU)	Yes	$15,001 - $50,000		$201 - $1,000
1.13	Line Intentionally Left Blank				
1.14	US bank (cash)	N/A	$15,001 - $50,000		None (or less than $201)
1.15	Line Intentionally Left Blank				
1.16	ALLSPRING SPECIAL SMALL CAP VALUE FUND (ESPNX)	Yes	$15,001 - $50,000		$201 - $1,000
1.17	ALLSPRING STRATEGIC MUNICIPAL BOND FUND (STRIX)	Yes	$50,001 - $100,000		$1,001 - $2,500
1.18	Line Intentionally Left Blank				
1.19	ISHARES MSCI ALL COUNTRY ASIA EX JAPAN ETF (AAXJ)	Yes	$1,001 - $15,000		None (or less than $201)
1.20	ISHARES TR RUSSELL 2000 ETF (IWM)	Yes	None (or less than $1,001)		None (or less than $201)
1.21	ISHARES CORE S&P U.S. GROWTH ETF (IUSG)	Yes	$100,001 - $250,000		$1,001 - $2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.22	ISHARES CORE S&P U.S. VALUE ETF (IUSV)	Yes	$100,001 - $250,000		$2,501 - $5,000
1.23	Line Intentionally Left Blank				
1.24	Line Intentionally Left Blank				
1.25	MAINSTAY MACKAY TAX FREE BOND FUND CLASS I (MTBIX)	Yes	$50,001 - $100,000		$2,501 - $5,000
1.26	SMEAD VALUE FUND CLASS I1 (SVFFX)	Yes	$100,001 - $250,000		$1,001 - $2,500
1.27	SPDR PORTFOLIO S&P 400 MID CAP ETF (SPMD)	Yes	$50,001 - $100,000		$1,001 - $2,500
1.28	SPDR PORTFOLIO S&P 600 SMALL CAP ETF (SPSM)	Yes	$50,001 - $100,000		$1,001 - $2,500
1.29	VANGUARD WORLD FD SHS ESG INTERNATIONAL STOCK ETF (VSGX)	Yes	$15,001 - $50,000		$201 - $1,000
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1.31	ALLSPRING SPECIAL MID CAP VALUE FUND CL INSTL (WFMIX)	Yes	$15,001 - $50,000		$1,001 - $2,500
1.32	BLACKROCK GLOBAL ALLOCATION FD INC INSTL (MALOX)	Yes	$15,001 - $50,000		$201 - $1,000
1.33	GQG PARTNERS EMERGING MKTS EQ FD CL INSTL (GQGIX)	Yes	$15,001 - $50,000		$201 - $1,000
1.34	GS GQG PARTNERS INTL OPPS FD CL INSTL (GSIMX)	Yes	$15,001 - $50,000		$201 - $1,000
1.35	GUGGENHEIM FLOATING RATE STRATEGIES FD INSTL CL (GIFIX)	Yes	None (or less than $1,001)		$1,001 - $2,500
1.36	JP MORGAN EQUITY INCOME FD I (HLIEX)	Yes	$50,001 - $100,000		$1,001 - $2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.37	JP MORGAN GLOBAL ALLOCATION FUND CL I (GAOSX)	Yes	$15,001 - $50,000		$1,001 - $2,500
1.38	NEUBERGER BERMAN LARGE CAP VALUE FD CL INSTL (NBPIX)	Yes	$100,001 - $250,000		$2,501 - $5,000
1.39	PACER US CASH COWS100 (COWZ)	Yes	$15,001 - $50,000		$201 - $1,000
1.40	SPDR DJ WLSHR MID CAP VALUE E (MDYV)	Yes	$15,001 - $50,000		$201 - $1,000
1.41	SPDR PORTFOLIO S&P 500 H DIVID ETF SHS (SPYD)	Yes	$15,001 - $50,000		$1,001 - $2,500
1.42	T ROWE PRICE DIVIDEND GROWTH FUND INV CL (PRDGX)	Yes	$50,001 - $100,000		$1,001 - $2,500
1.43	TOUCHSTONE SANDS CAPITAL EMERG MKTS GRWTH FD CL Y (TSEMX)	Yes	$1,001 - $15,000		None (or less than $201)
1.44	ALLSRING MUNICIPAL BOND (WMBIX)	Yes	$15,001 - $50,000		$201 - $1,000
1.45	ARTISAN INTERNATIONAL (APDKK)	Yes	$15,001 - $50,000		$201 - $1,000
1.46	NUVEEN INTM DUR MUNI (NUVBX)	Yes	$15,001 - $50,000		$201 - $1,000
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#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
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4.30	Line Intentionally Left Blank				
4.31	Line Intentionally Left Blank				
4.32	Line Intentionally Left Blank				
5	Brokerage account #5	No			
5.1	US bank (cash)	N/A	None (or less than $1,001)		None (or less than $201)
5.2	FedFund Institutional Shares (TFDXX)	Yes	$250,001 - $500,000		$5,001 - $15,000
6	U.S. bank #1 (cash)	N/A	$1,001 - $15,000		None (or less than $201)
7	U.S. bank #2 (cash)	N/A	$100,001 - $250,000		None (or less than $201)

7. Transactions

#	DESCRIPTION	TYPE	DATE	AMOUNT
1	GUGGENHEIM FLOATING RATE STRATEGIES FD INSTL CL (GIFIX)	Sale	04/03/2023	$1,001 - $15,000
2	GUGGENHEIM FLOATING RATE STRATEGIES FD INSTL CL (GIFIX)	Sale	04/03/2023	$1,001 - $15,000
3	ISHARES TR RUSSELL 2000 ETF (IWM)	Sale	11/06/2023	$1,001 - $15,000
4	ALGER WEATHERBIE SPECIALIZED GROWTH FUND CLASS Z (ASMZX)	Sale	11/06/2023	$1,001 - $15,000
5	ALGER WEATHERBIE SPECIALIZED GROWTH FUND CLASS Z (ASMZX)	Sale	11/06/2023	$1,001 - $15,000
6	ALGER WEATHERBIE SPECIALIZED GROWTH FUND CLASS Z (ASMZX)	Sale	11/06/2023	$1,001 - $15,000
7	GUGGENHEIM FLOATING RATE STRATEGIES FD INSTL CL (GIFI STRATEGIES FD INSTL CL (GIFIX)	Sale	04/03/2023	$15,001 - $50,000
8	VIRTUS KAR INTERNATIONAL SMALL MID CAP FUND CL I (VIISX)	Sale	11/06/2023	$1,001 - $15,000
9	VIRTUS KAR INTERNATIONAL SMALL MID CAP FUND CL I (VIISX)	Sale	11/06/2023	$1,001 - $15,000
10	VIRTUS KAR INTERNATIONAL SMALL MID CAP FUND CL I (VIISX)	Sale	11/06/2023	$1,001 - $15,000
11	NEUBERGER BERMAN LARGE CAP VALUE FD CL INSTL (NBPIX) (dividend reinvestment)	Purchase	12/19/2023	$1,001 - $15,000
12	ARTISAN INTERNATIONAL (APDKK)	Purchase	11/06/2023	$15,001 - $50,000
13	PACER US CASH COWS100 (COWZ)	Purchase	11/06/2023	$1,001 - $15,000
14	ISHARES CORE S&P U.S. GROWTH ETF (IUSG)	Purchase	11/06/2023	$1,001 - $15,000
15	NUVEEN INTM DUR MUNI (NUVBX)	Purchase	04/03/2023	$15,001 - $50,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
16	ALLSPRING MUNICIPAL BOND (WMBIX)	Purchase	04/03/2023	$15,001 - $50,000
17	LOOMIS SAYLES GROWTH FUND CL Y (LSGRX) (dividend reinvestment)	Purchase	12/22/2023	$1,001 - $15,000
18	NEUBERGER BERMAN LARGE CAP VALUE FD CL INSTL (NBPIX) (dividend reinvestment)	Purchase	12/19/2023	$1,001 - $15,000
19	Smead Value Fund Class I1 Shares (SVFFX) (dividend reinvestment)	Purchase	12/18/2023	$1,001 - $15,000
20	T Rowe Price Dividend Growth Fund, Inc (PRDGX) (dividend reinvestment)	Purchase	12/15/2023	$1,001 - $15,000
21	Janus Henderson Enterprise Fund Class I Shares (JMGRX) (dividend reinvestment)	Purchase	12/08/2023	$1,001 - $15,000
22	JPMorgan Global Allocation Fund Class I Shares (GAOSX) (dividend reinvestment)	Purchase	01/04/2023	$1,001 - $15,000
23	ARTISAN INTERNATIONAL (APDKK)	Purchase	11/06/2023	$15,001 - $50,000
24	PIMCO INCOME FUND CL I2 (PONPX)	Purchase	11/06/2023	$15,001 - $50,000
25	Virtus KAR International Small-Cap Fund Class I Shares (VIISX)	Sale	11/06/2023	$15,001 - $50,000
26	PIMCO Low Duration Income Fund Class I-2 Shares (PFTPX)	Sale	11/06/2023	$15,001 - $50,000
27	PACER US CASH COWS100 (COWZ)	Purchase	04/03/2023	$1,001 - $15,000
28	SPDR Portfolio S&P 500 Growth ETF (SPYG)	Sale	04/03/2023	$1,001 - $15,000
29	FedFund Institutional Shares (TFDXX)	Sale	04/04/2023	$1,001 - $15,000
30	PIMCO Low Duration Income Fund Class I-2 Shares (PFTPX)	Sale	04/03/2023	$15,001 - $50,000
31	Lord Abbett Ultra Short Bond Fund Class I Shares (LUBYX)	Sale	04/03/2023	$50,001 - $100,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
32	ALPS SMITH TOTAL RETURN (SMTHX)	Purchase	04/03/2023	$15,001 - $50,000
33	JPMORGAN CORE BOND FD (WOBDX)	Purchase	04/03/2023	$15,001 - $50,000
34	ALPS SMITH TOTAL RETURN (SMTHX)	Purchase	11/06/2023	$1,001 - $15,000
35	JPMORGAN CORE BOND FD (WOBDX)	Purchase	11/06/2023	$1,001 - $15,000
36	SPDR Portfolio S&P 500 ETF (SPLG)	Sale	04/03/2023	$1,001 - $15,000
37	ISHARES CORE S&P US VALUE ETF (IUSV)	Purchase	04/03/2023	$1,001 - $15,000
38	ALPS SMITH SHORT DURATION BD CL INSTL (SMDSX)	Sale	04/03/2023	$15,001 - $50,000
39	TRANSAMERICA SHORT TERM BOND FUND CL I (TSTIX)	Sale	04/03/2023	$15,001 - $50,000
40	JPMORGAN CORE BOND FD (WOBDX)	Purchase	04/03/2023	$15,001 - $50,000
41	ALPS SMITH TOTAL RETURN (SMTHX)	Purchase	04/03/2023	$15,001 - $50,000
42	FedFund Institutional Shares (TFDXX)	Purchase	03/20/2023	$1,001 - $15,000
43	FedFund Institutional Shares (TFDXX)	Purchase	04/27/2023	$1,001 - $15,000
44	FedFund Institutional Shares (TFDXX)	Purchase	12/01/2023	$1,001 - $15,000
45	FedFund Institutional Shares (TFDXX)	Purchase	12/21/2023	$1,001 - $15,000
46	FedFund Institutional Shares (TFDXX)	Purchase	11/20/2023	$1,001 - $15,000
47	FedFund Institutional Shares (TFDXX)	Purchase	11/01/2023	$50,001 - $100,000
48	FedFund Institutional Shares (TFDXX)	Purchase	10/31/2023	$50,001 - $100,000
49	FedFund Institutional Shares (TFDXX)	Purchase	10/19/2023	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
50	FedFund Institutional Shares (TFDXX)	Purchase	09/25/2023	$1,001 - $15,000
51	FedFund Institutional Shares (TFDXX)	Purchase	08/28/2023	$1,001 - $15,000
52	FedFund Institutional Shares (TFDXX)	Purchase	08/23/2023	$1,001 - $15,000
53	FedFund Institutional Shares (TFDXX)	Purchase	07/19/2023	$1,001 - $15,000
54	FedFund Institutional Shares (TFDXX)	Purchase	05/17/2023	$1,001 - $15,000
55	FedFund Institutional Shares (TFDXX)	Purchase	04/19/2023	$1,001 - $15,000
56	FedFund Institutional Shares (TFDXX)	Purchase	04/13/2023	$1,001 - $15,000
57	FedFund Institutional Shares (TFDXX)	Sale	03/17/2023	$1,001 - $15,000
58	FedFund Institutional Shares (TFDXX)	Purchase	03/14/2023	$1,001 - $15,000
59	FedFund Institutional Shares (TFDXX)	Purchase	03/10/2023	$1,001 - $15,000
60	FedFund Institutional Shares (TFDXX)	Purchase	02/16/2023	$1,001 - $15,000

8. Liabilities

None

9. Gifts and Travel Reimbursements

None

Endnotes

PART	#	ENDNOTE
1.	1	LOM Strategies, LLC is a single-member limited liability company for which I am the sole member. My consulting business continues to be inactive during my appointment.

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 $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).