

Report Type: Nominee Report

Year (Annual Report only):

Date of Appointment:

Date of Termination:

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

### Filer's Information

---

Bisignano, Frank John

Commissioner, Social Security Administration

---

Other Federal Government Positions Held During the Preceding 12 Months:

None

---

Names of Congressional Committees Considering Nomination:

- Committee on Finance
- 

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/ Bisignano, Frank John [electronically signed on 01/14/2025 by Bisignano, Frank John 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/ White, Angela R, Certifying Official [electronically signed on 02/24/2025 by White, Angela R in Integrity.gov]

---

Other review conducted by

/s/ White, Angela R, Ethics Official [electronically signed on 02/24/2025 by White, Angela R in Integrity.gov]

---

U.S. Office of Government Ethics Certification

/s/ Apol, David, Certifying Official [electronically signed on 02/24/2025 by Apol, David in Integrity.gov]

## 1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME		CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	Fiserv, Inc		Milwaukee, Wisconsin	Corporation	President, CEO	1/2023	Present
2	Sagent M&C, LLC d/b/a Sagent Lending Technologies	See Endnote	King of Prussia, Pennsylvania	Corporation	Board of Directors	7/2024	Present
3	National September 11 Memorial & Museum		New York, New York	Non-Profit	Director	1/2009	Present
4	Perelman Center of Performing Arts		New York, New York	Non-Profit	Board of Directors and member of Finance Committee	6/2017	Present
5	The Battery Conservancy Inc.		New York, New York	Non-Profit	Chairman of the Board of Trustees	1/2007	Present
6	Mt Sinai Health System		New York, New York	Hospital	Member of the Board of Trustees	1/2011	Present
7	Metro Atlanta Chamber		Atlanta, Georgia	Non-Profit	Director	1/2021	Present
8	The American Society of the Italian Legion of Merit		New York, New York	Non-Profit	Director	8/2021	Present
9	Institute for Veterans and Military Families - Syracuse University		Syracuse, New York	University/College	Advisory Member of the Board of Directors	1/2011	Present
10	Fiserv, Inc.		Milwaukee, Wisconsin	Corporation	Chairman of the Board	5/2022	Present
11	MAHA at Watchung, LLC		Watchung, New Jersey	Corporation	Managing Member	6/2020	Present

#	ORGANIZATION NAME	CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
12	MAH Realty Management LLC (management of rental properties)	New York, New York	Corporation	Managing Member	4/2020	1/2025
13	Interactive Audience participation, LLC (patent management)	Bedminster, New Jersey	Corporation	Sole Member	5/2020	Present
14	Family Trust #2 (revocable trust)	New York, New York	Trust	Trustee	7/2020	Present
15	Partnership for New York City	New York, New York	Non-Profit	Member	9/2014	Present
16	2022 Trust (irrevocable) (dissolved)	New York, New York	Trust	Trustee	11/2022	Present
17	MAHA at Bachelor Gulch, LLC	Eagle, Colorado	Corporation	Managing Member	7/2024	Present
18	Remainder Trust 1	Watchung, New Jersey	Trust	Trustee	7/2020	Present
19	Remainder Trust 2	Watchung, New Jersey	Trust	Trustee	7/2020	Present
20	Remainder Trust 3	Watchung, New Jersey	Trust	Trustee	7/2020	Present

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Fiserv, Inc	N/A	Over \$50,000,000	salary and bonuses	\$1,400,000
2	Fiserv, Inc, stock options (FI) vested	N/A			None (or less than \$201)
3	Fiserv, Inc, unvested restricted stock units	N/A	\$5,000,001 - \$25,000,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
4	Inherited IRA	No		Cash payments.	\$69,039
4.1	Fiserv Stock (FI)	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
5	IRA 1	No			
5.1	Fiserv Stock (FI)	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
6	IRA 2	No			
6.1	Fiserv Stock (FI)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7	IRA 3	No			
7.1	Fiserv Stock (FI)	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
8	Citibank Cash Balance Pension Plan	N/A	\$100,001 - \$250,000		None (or less than \$201)
9	Fiserv Savings Plan	No			None (or less than \$201)
9.1	Vanguard Target Retirement 2025 Trust Select	Yes	\$250,001 - \$500,000		None (or less than \$201)
10	Fiserv, Inc. (FI) Performance Equity Grants	N/A	Over \$50,000,000		None (or less than \$201)
11	Collectiblexchange LLC (sells sports memorabilia)	See Endnote	\$5,000,001 - \$25,000,000	estimated operating business income	\$50,000
12	Interactive Audience Participation, LLC (holds filer's patents)	No	\$1,001 - \$15,000		None (or less than \$201)
12.1	Patent #6434398 Method and apparatus for interactive audience participation at a live spectator event (value not readily ascertainable)	N/A			None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
12.2	Patent # 6650903 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.3	Patent #6760595 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.4	Patent # 6975878 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.5	Patent #6996413 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.6	Patent # 7123930 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.7	Patent #7248888 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.8	Patent # 7587214 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.9	Patent # 7792539 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
12.10	Patent # 7860523 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.11	Patent #7424304 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.12	Patent # 7856242 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.13	Patent #7693532 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.14	Patent #7797005 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.15	Patent # 8131279 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.16	Patent #8023977 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.17	Patent #8213975 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
12.18	Patent #8423005 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.19	Patent #9143828 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.20	Patent #8412172 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.21	Patent #9665886 Method and Apparatus for Interactive Audience Participation at a Live Spectator Event (value not readily ascertainable)	N/A			None (or less than \$201)
12.22	Patent #7263378 Method and Apparatus for Interactive Audience participation at a live entertainment event (value not readily ascertainable)	N/A			None (or less than \$201)
12.23	Patent #7522930 Method and apparatus for interactive audience participation at a live entertainment event(value not readily ascertainable)	N/A			None (or less than \$201)

### 3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	Fiserv, Inc	Milwaukee, Wisconsin	I will retain my vested options following my resignation from Fiserv, Inc. I will divest them as soon as practicable, but not later than 120 days after my confirmation.	2/2020



#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
2	Fiserv, Inc	Milwaukee, Wisconsin	I hold unvested restricted stock units (RSUs) in Fiserv, Inc. Following my resignation from Fiserv but prior to assuming the duties of the position of Commissioner, Fiserv will vest the RSUs by paying them out in common stock, in accordance with the terms set by the Talent and Compensation Committee of Fiserv's Board of Directors, or I will forfeit them. I will divest the resulting common stock as soon as practicable, but not later than 120 days after my confirmation.	1/2020
3	Citibank Cash Balance Pension	New York, New York	I will continue to participate in this cash balance pension plan. The plan sponsor will not make further contributions after my separation.	1/2012
4	Fiserv, Inc	Milwaukee, Wisconsin	Pursuant to Fiserv, Inc. Long Term Incentive Plan, I received performance equity grants in 2023 and 2024, which will vest in 2026 and 2027, respectively. I did not and will not receive a grant in 2025. Following my resignation from Fiserv but prior to assuming the duties of the position of Commissioner, Fiserv will vest a portion of the Performance Equity Grant in proportion with the amount of time I worked at Fiserv during the three-year performance period by paying them out in common stock, in accordance with the terms set by the Talent and Compensation Committee of Fiserv's Board of Directors, or I will forfeit them. I will divest the resulting common stock as soon as practicable, but not later than 120 days after my confirmation.	1/2020
5	Fiserv, Inc. Savings Plan	Milwaukee, Wisconsin	I will continue to participate in this defined contribution plan. The plan sponsor will not make contributions after my separation	2/2025

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

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES
1	Fiserv, Inc	Milwaukee, Wisconsin	President, CEO and Chairman

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	IRA 1	No			
1.1	Vanguard Growth Index	Yes	\$15,001 - \$50,000		None (or less than \$201)
2	IRA 2	No			
2.1	PGIM Jennison Focused Growth A	Yes	\$50,001 - \$100,000		None (or less than \$201)

## 6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Brokerage Account #1	No			
1.1	Fiserv, Inc. (FISV)	N/A	\$25,000,001 - \$50,000,000		None (or less than \$201)
2	US bank (cash)	N/A	\$1,000,001 - \$5,000,000	Interest	\$50,001 - \$100,000
3	Brokerage Account # 2	No			
3.1	Fiserv, Inc. (FI)	N/A	Over \$50,000,000		None (or less than \$201)
3.2	PE Premier KKR Energy Income & Growth/Real Estate Onshore Feeder Fund LP (Invests in oil and gas assets, midstream infrastructure, and mineral and royalty interests)	Yes	\$1,001 - \$15,000		\$5,001 - \$15,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3.3	TRG Growth Partnership, a private equity fund, (purchase companies, mature and sell at a profit.)	Yes	\$1,001 - \$15,000		\$201 - \$1,000
4	JOHN HANCOCK LIFE INSURANCE CO OF NEW YORK SEPARATE ACCOUNT B Accumulation Variable Universal Life	No			
4.1	John Hancock Core Bond Fund	Yes	\$15,001 - \$50,000		None (or less than \$201)
4.2	John Hancock Disciplined Value Emerging Market	Yes	\$100,001 - \$250,000		None (or less than \$201)
4.3	John Hancock 500 Index	Yes	\$500,001 - \$1,000,000		None (or less than \$201)
4.4	John Hancock Global Equity Fund	Yes	\$100,001 - \$250,000		None (or less than \$201)
4.5	John Hancock Funds II Opportunistic Fixed Income Fund Class 1 Shares (JIGDX)	Yes	\$15,001 - \$50,000		None (or less than \$201)
4.6	John Hancock High Yield Fund Class I Shares (JYHIX)	Yes	\$50,001 - \$100,000		None (or less than \$201)
4.7	John Hancock Funds II Real Estate Securities Fund Class 1 Shares (JIREX)	Yes	\$100,001 - \$250,000		None (or less than \$201)
4.8	John Hancock Small Cap Index	Yes	\$1,000,001 - \$5,000,000		None (or less than \$201)
4.9	John Hancock Strategic Income Opportunities	Yes	\$50,001 - \$100,000		None (or less than \$201)
4.10	John Hancock Total Stock Market index	Yes	\$250,001 - \$500,000		None (or less than \$201)
5	Brokerage Account #3	No			
5.1	Fiserv, Inc. (FI)	N/A	Over \$50,000,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.2	Humana, Inc. (HUM)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
6	Geosynfuels, LLC (Energy: development of low-cost biological processes for the production of advanced biofuels using agricultural waste). See Endnote	N/A	None (or less than \$1,001)		None (or less than \$201)
7	KKR Dislocation Opportunities (Domestic) Feeder LP	Yes	\$50,001 - \$100,000		\$5,001 - \$15,000
8	KKR Global Impact Fund SBS (Unlev) LP	Yes	\$250,001 - \$500,000		\$15,001 - \$50,000
9	KKR NGT Growth Fund II SBS (Unlev) LP	Yes	\$1,000,001 - \$5,000,000		\$100,001 - \$1,000,000
10	KKR Global Infrastructure Investors IV SBS (Unlev) LP	Yes	\$100,001 - \$250,000		\$2,501 - \$5,000
11	KKR Lending Partners Europe II Feeder LP	Yes	\$15,001 - \$50,000		\$15,001 - \$50,000
12	ICONIQ Strategic Partners VI, LP	Yes	\$250,001 - \$500,000		\$2,501 - \$5,000
13	MyCareGorithm, LLC (a company to improve the patient experience through the use of technology.)	N/A	\$25,000,001 - \$50,000,000		None (or less than \$201)
14	Safer Sports Technologies LLC	N/A	\$5,000,001 - \$25,000,000		None (or less than \$201)
15	Alternative Packing Solutions LLC (sale and services of packaging and shipping supplies)	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
16	Mining Solutions Group LLC (winding down/defunked)	N/A	None (or less than \$1,001)		None (or less than \$201)
17	Wood Solutions Group, LLC (winding down/defunked)	N/A	None (or less than \$1,001)		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
18	Residential Rental Property, Mantoloking, NJ	N/A	\$1,000,001 - \$5,000,000		\$15,001 - \$50,000
19	MAHAA at Monroe, LLC	No			
19.1	MAHAA at Montclair, LLC	No			
19.1.1	Residential Rental property, Montclair New Jersey	N/A	\$500,001 - \$1,000,000	Rent or Royalties	\$1,000,001 - \$5,000,000
19.1.2	Residential Rental Property, Westfield, New Jersey	N/A	\$1,000,001 - \$5,000,000	Rent or Royalties	\$50,001 - \$100,000
19.2	MAHAA at Ocean Drive, LLC	No			
19.2.1	Residential Rental Property, Emerald Isle, North Carolina	N/A	\$1,000,001 - \$5,000,000	Rent or Royalties	\$100,001 - \$1,000,000
19.3	MAHAA at Ocean Ridge, LLC	N/A	\$1,000,001 - \$5,000,000	Rent or Royalties	\$100,001 - \$1,000,000
19.3.1	Residential Rental Property, Atlantic Beach, North Carolina	N/A	\$1,000,001 - \$5,000,000	Rent or Royalties	\$100,001 - \$1,000,000
20	MAHA at Watchung, LLC (commercial rental property)	No			
20.1	Commercial Rental property, Watchung, New Jersey	N/A	\$5,000,001 - \$25,000,000	Rent or Royalties	None (or less than \$201)
21	Note Receivable from MAH Realty Management, LLC	N/A	\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000
22	Note Receivable from Nate Roe Baseball Academy, LLC	N/A	\$15,001 - \$50,000	Interest	None (or less than \$201)
23	UTMA 1	No			
23.1	Fiserv, Inc. (FI)	N/A	\$250,001 - \$500,000		None (or less than \$201)
24	2022 Trust	See Endnote			None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
24.1	Fiserv, Inc. (FI)	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
25	2020 Trust 1 (owns 1/3 interest in assets below)	No			
25.1	Fiserv, Inc. (FISV)	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
25.2	MAH Realty Management LLC (real estate rental)	No			
25.2.1	Residential Rental Real Estate, Watchung, NJ	N/A	\$5,000,001 - \$25,000,000	Rent or Royalties	\$50,001 - \$100,000
25.2.2	Residential Rental Real Estate, 19-B New York, New York	N/A	\$1,000,001 - \$5,000,000	Rent or Royalties	\$50,001 - \$100,000
25.2.3	Residential Rental Real Estate, PH1F-G, New York, New York	N/A	\$5,000,001 - \$25,000,000	Rent or Royalties	\$100,001 - \$1,000,000
25.2.4	Residential Rental Real Estate, 25F, New York, New York	N/A	\$1,000,001 - \$5,000,000	Rent or Royalties	\$100,001 - \$1,000,000
25.2.5	Residential Rental Real Estate, 6-H New York, New York	N/A	\$500,001 - \$1,000,000	Rent or Royalties	\$50,001 - \$100,000
25.2.6	Vacant Land, Watchung, New Jersey	N/A	\$500,001 - \$1,000,000		None (or less than \$201)
26	2020 Trust 2 (irrevocable) (owns 1/3 interest in assets at Part 6, Line item 25)	No			
27	2020 Trust 3 (Irrevocable) (owns 1/3 interest in assets at Part 8, Line item 25)	No			
28	Remainder Trust 1	No			
28.1	Fiserv, Inc. (FI)	N/A	\$5,000,001 - \$25,000,000		None (or less than \$201)
29	Remainder Trust 2	No			

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
29.1	Fiserv, Inc. (FI)	N/A	\$5,000,001 - \$25,000,000		None (or less than \$201)
30	Remainder Trust 3	No			
30.1	Fiserv, Inc. (FI)	N/A	\$5,000,001 - \$25,000,000		None (or less than \$201)
31	2020 Spousal Lifetime Access Trust (irrevocable)	No	\$5,000,001 - \$25,000,000		None (or less than \$201)
31.1	Fiserv, Inc. (FISV)	N/A	\$5,000,001 - \$25,000,000		None (or less than \$201)
32	Family Trust #1 (irrevocable)	No			
32.1	LINCOLN LIFE FLEXIBLE PREMIUM CVIII Variable Life	No			
32.1.1	American Funds Global Small Capitalization Fund Class 2	Yes	\$100,001 - \$250,000		None (or less than \$201)
32.1.2	American Funds Growth Fund Class 2	Yes	\$500,001 - \$1,000,000		None (or less than \$201)
32.1.3	America Funds Growth-Income Fund	Yes	\$250,001 - \$500,000		None (or less than \$201)
32.1.4	American Funds International Fund Class 2	Yes	\$100,001 - \$250,000		None (or less than \$201)
32.1.5	LVIP Macquarie U.S. REIT Fund-Standard Class	Yes	\$100,001 - \$250,000		None (or less than \$201)
32.1.6	DWS Equity 500 Index VIP Class A	Yes	\$250,001 - \$500,000		None (or less than \$201)
32.1.7	AMF Global Growth C2	Yes	\$250,001 - \$500,000		None (or less than \$201)
33	MAHA at Bachelor Gulch, LLC (rental/vacation property)	No			

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
33.1	Residential Rental Real Estate, Bachelor Gluch, Colorado	See Endnote	N/A	\$5,000,001 - \$25,000,000		None (or less than \$201)

## 7. Transactions

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

## 8. Liabilities

#	CREDITOR NAME		TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
1	Morgan Stanley	See Endnote	Mortgage (investment/rental property)	\$5,000,001 - \$25,000,000	2024	2024	10 year
2	Goldman Sachs		Exercised Line of Credit	\$5,000,001 - \$25,000,000	2024	SOFR + 1.8%	2
3	Morgan Stanley		Exercised Line of Credit	\$5,000,001 - \$25,000,000	2024	SOFR + 1.9%	2
4	Morgan Stanley	See Endnote	Mortgage (investment/rental property)	\$100,001 - \$250,000	2014	2.85%	30
5	KKR Dislocation Opportunities (Domestic) Fund, LP		Capital Commitment	\$10,001 - \$15,000	2020	N/A	on demand
6	KKR Global Impact Fund SBS (Unlev), LP		Capital Commitment	\$15,001 - \$50,000	2020	N/A	on demand
7	PE Premier KKR Energy Income & Growth/Real Estate Onshore Feeder Fund LP		Capital Commitment	\$15,001 - \$50,000	2013	N/A	on demand
8	KKR Lending Partners Europe II Feeder, LP		Capital commitment	\$15,001 - \$50,000	2020	N/A	on demand



#	CREDITOR NAME	TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
9	Iconiq Strategic Partners VI, LP	Capital Commitment	\$10,001 - \$15,000	2021	N/A	on demand

## 9. Gifts and Travel Reimbursements

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

## Endnotes

PART	#	ENDNOTE
1.	2	Subsequent to the submission of this report, the filer resigned from this position 2/2025
2.	11	income reported is an estimate based on 2023 tax year K1 and increase in business in 2024. 2024 K1 is not yet available. Only passive income.
6.	6	Company is in the process of winding down and has no value
6.	24	Subsequent to the submission of this report 2/2025, the assets at Line item 24.1 have been divested from this trust and 1/3 transferred to each of the filer's (3) children's respective Remainder Trusts 1-3.
6.	33.1	Property was acquired in 2024 and as of the date of this report has not been rented.
8.	1	Property in Colorado. 2024 purchase.
8.	4	Mortgage for property identified on line item 25.2.5

# 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).

---