

**From:** [Integrity.gov](https://integrity.gov)  
**To:** [Jim Robertson](#)  
**Subject:** Integrity.gov: Report Pending Action  
**Date:** Wednesday, December 21, 2016 12:16:52 PM

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A 2017 Nominee report for Perry, Richard James is pending your action as OGE Nominee Reviewer. You may access the report by logging into integrity at <https://integrity.gov>.

**From:** [David J. Apol](#)  
**To:** [Deborah J. Bortot](#)  
**Cc:** [Jim Robertson](#); [Heather A. Jones](#); [Sandra S. Mabry](#); [Keith Labeledz](#); [Teresa L. Williamson](#); [Rodrick T. Johnson](#); [Emory A. Rounds III](#); "Beard, Susan"  
**Subject:** RE: PRECLEARED: James Richard Perry  
**Date:** Friday, January 06, 2017 4:40:32 PM

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Well done, folks!

Dave

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**From:** Deborah J. Bortot  
**Sent:** Friday, January 06, 2017 3:03 PM  
**To:** 'Ann M Donaldson'  
**Cc:** Jim Robertson; David J. Apol; Heather A. Jones; Sandra S. Mabry; Keith Labeledz; Teresa L. Williamson; Rodrick T. Johnson; Emory A. Rounds III; 'Beard, Susan'  
**Subject:** PRECLEARED: James Richard Perry

Annie, James Richard Perry is precleared.

Jim, please forward the ethics agreement to Annie.

Thanks!

Deb

Deborah J. Bortot  
Chief, Presidential Nominations Branch  
U.S. Office of Government Ethics  
1201 New York Ave., NW, Suite 500  
Washington, DC 20005-3917  
Telephone: (202) 482-9227  
Facsimile: (202) 482-9237

**From:** [Emory A. Rounds III](#)  
**To:** (b)(6) Emory Mallon's email  
**Cc:** [Keith Labeledz](#); [Jim Robertson](#)  
**Subject:** INTEGRITY NAME ISSUE  
**Date:** Friday, December 30, 2016 9:53:23 AM

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Good morning!

The Integrity report now in place lists Governor Perry's name incorrectly – it is “Richard James Perry” when it should be instead “James Richard Perry”.

Can a “new” report opportunity be generated in Integrity with the correct name **while leaving the “old/current report in place for data importation purposes?”**

Step One: Change the name in the system

Step Two: Assign him a new report

If questions, please call Keith Labeledz at 202-482-9218.

Please let us know when this is done, as the filer and agency are standing by.

Thanks much!

Emory

**From:** [Emory A. Rounds III](#)  
**To:** [Jim Robertson](#)  
**Subject:** RE: Perry report contacts  
**Date:** Thursday, December 22, 2016 12:12:29 PM

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Thanks!

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**From:** Jim Robertson  
**Sent:** Thursday, December 22, 2016 12:12 PM  
**To:** Emory A. Rounds III  
**Subject:** RE: Perry report contacts

Try it again.

DAEO: **Susan Beard**  
Title: DAEO/Assistant General Counsel for General Law  
Position: Ethics Official  
Email: (b)(6)  
Phone: (b)(6)

ADAEO: **Christina ("Tina") Hymer**  
Title: Deputy Assistant General Counsel for Standards of Conduct  
Position: Ethics Official  
Email: (b)(6)  
Phone: (b)(6)

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**From:** Emory A. Rounds III  
**Sent:** Thursday, December 22, 2016 12:09 PM  
**To:** Jim Robertson  
**Subject:** RE: Perry report contacts

Telephone for Susan?

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**From:** Jim Robertson  
**Sent:** Thursday, December 22, 2016 12:07 PM  
**To:** Emory A. Rounds III  
**Subject:** Perry report contacts

Susan is working the report right now as Tina will be out for the next week or two.

DAEO: **Susan Beard**  
Title: DAEO/Assistant General Counsel for General Law  
Position: Ethics Official  
Email: (b)(6)  
Phone: (b)(6)

ADAEO: **Christina ("Tina") Hymer**  
Title: Deputy Assistant General Counsel for Standards of Conduct  
Position: Ethics Official  
Email: (b)(6)  
Phone: (b)(6)

**From:** [Deborah J. Bortot](#)  
**To:** ["Ann M. Donaldson"](#)  
**Cc:** [Jim Robertson](#)  
**Subject:** Rick Perry  
**Date:** Friday, December 30, 2016 6:20:38 PM

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Annie,

We are following up to make sure you have initiated a new report for Rick Perry because PTT entered his name incorrectly.

Thanks.

Deb

## Jennifer Matis

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**From:** Heather A. Jones  
**Sent:** Tuesday, January 10, 2017 3:27 PM  
**To:** Lorna A. Syme; Teresa L. Williamson  
**Subject:** Fw: Governor Rick Perry

Sent from my BlackBerry 10 smartphone on the Verizon Wireless 4G LTE network.

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**From:** Heather A. Jones  
**Sent:** Tuesday, January 10, 2017 3:26 PM  
**To:** Jim Robertson; Teresa L. Williamson  
**Subject:** Fw: Governor Rick Perry

Sent from my BlackBerry 10 smartphone on the Verizon Wireless 4G LTE network.

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**From:** Ann M Donaldson  
**Sent:** Tuesday, January 10, 2017 3:24 PM  
**To:** Deborah J. Bortot; Heather A. Jones  
**Subject:** Governor Rick Perry

On behalf of the President-Elect, this email serves as confirmation that the President-Elect intends to nominate Governor Rick Perry to be Secretary of Energy. Please transmit his pre-cleared 278 report to the appropriate Senate committee.

Thank you,  
Annie

Ann M. Donaldson  
Associate  
[JONES DAY® - One Firm Worldwide<sup>SM</sup>](#)  
51 Louisiana Avenue, NW  
Washington, DC 20001  
Office (b)(6) contact info

=====  
This e-mail (including any attachments) may contain information that is private, confidential, or protected by attorney-client or other privilege. If you received this e-mail in error, please delete it from your system without copying it and notify sender by reply e-mail, so that our records can be corrected.  
=====

## Jennifer Matis

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**From:** Ann M Donaldson <(b)(6) contact info>  
**Sent:** Tuesday, January 10, 2017 3:25 PM  
**To:** Deborah J. Bortot; Heather A. Jones  
**Subject:** Governor Rick Perry

On behalf of the President-Elect, this email serves as confirmation that the President-Elect intends to nominate Governor Rick Perry to be Secretary of Energy. Please transmit his pre-cleared 278 report to the appropriate Senate committee.

Thank you,  
Annie

Ann M. Donaldson  
Associate  
[JONES DAY® - One Firm Worldwide<sup>SM</sup>](#)  
51 Louisiana Avenue, NW  
Washington, DC 20001  
Office (b)(6) contact info

=====  
This e-mail (including any attachments) may contain information that is private, confidential, or protected by attorney-client or other privilege. If you received this e-mail in error, please delete it from your system without copying it and notify sender by reply e-mail, so that our records can be corrected.  
=====

**From:** [Deborah J. Bortot](#)  
**To:** ["Ann M Donaldson"](#)  
**Cc:** [Heather A. Jones](#)  
**Subject:** FW: PRECLEARED: James Richard Perry  
**Date:** Sunday, January 08, 2017 10:23:34 AM

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Annie,

Susan Beard corrected some minor typos on the report. Do you know if there will be additional changes? If these are the only changes, he is still precleared.

Thanks,

Deb

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**From:** Beard, Susan [mailto:(b)(6)]

**Sent:** Saturday, January 07, 2017 9:44 PM

**To:** Deborah J. Bortot

**Cc:** Jim Robertson; Hymer, Christina

**Subject:** RE: PRECLEARED: James Richard Perry

Deb and Jim –FYI, I just made three slight changes to Perry’s 278 – (b)(6)

(b)(6)

(b)(6)

Susan

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**From:** Deborah J. Bortot [<mailto:djbortot@oge.gov>]

**Sent:** Friday, January 06, 2017 3:03 PM

**To:** 'Ann M Donaldson' (b)(6) >

**Cc:** Jim Robertson <[jfrobert@oge.gov](mailto:jfrobert@oge.gov)>; David J. Apol <[djapol@oge.gov](mailto:djapol@oge.gov)>; Heather A. Jones <[hajones@oge.gov](mailto:hajones@oge.gov)>; Sandra S. Mabry <[ssmabry@oge.gov](mailto:ssmabry@oge.gov)>; Keith Labeledz <[klabeledz@oge.gov](mailto:klabeledz@oge.gov)>; Teresa L. Williamson <[tlwillia@oge.gov](mailto:tlwillia@oge.gov)>; Rodrick T. Johnson <[rjohnson@oge.gov](mailto:rjohnson@oge.gov)>; Emory A. Rounds III <[earounds@oge.gov](mailto:earounds@oge.gov)>; Beard, Susan <(b)(6)>

**Subject:** PRECLEARED: James Richard Perry

Annie, James Richard Perry is precleared.

Jim, please forward the ethics agreement to Annie.

Thanks!

Deb

Deborah J. Bortot

Chief, Presidential Nominations Branch

U.S. Office of Government Ethics

1201 New York Ave., NW, Suite 500

Washington, DC 20005-3917

Telephone: (202) 482-9227

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**From:** [Teresa L. Williamson](#)  
**To:** (b)(6) D Ripchensky  
**Cc:** [Deborah J. Bortot](#); [Sandra S. Mabry](#); [Rodrick T. Johnson](#); [Heather A. Jones](#); (b)(6) A Donaldson  
**Bcc:** [Teresa L. Williamson](#)  
**Subject:** Public Financial Disclosure Report of James Richard Perry  
**Date:** Tuesday, January 10, 2017 4:42:54 PM  
**Attachments:** Perry, James Richard finalEA.pdf  
Perry, James Richard final278.pdf  
Perry, James Richard finalsenateltr.pdf

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Good Afternoon,

I've attached the financial disclosure package for James Richard Perry. President-Elect Trump has announced his intention to nominate Mr. Perry for the position of Secretary, Department of Energy.

The hard copy of the attached documents will be placed at OGE reception for pick up by a Senate rider page per our agreement. If you have any questions, please contact Teresa Williamson @ 202-482-9283.

**Please respond to this message to confirm receipt of the attached package, and please let me know in your response whether you will send a Senate rider page.**

Thanks!

Teresa Williamson  
Presidential Nominations Branch  
U.S. Office of Government Ethics  
1201 New York Avenue, NW - Suite 500  
Washington, DC 20005  
202-482-9283

**From:** [Ann M Donaldson](#)  
**To:** [Ann Donaldson](#); [Deborah J. Bortot](#); [Heather A. Jones](#)  
**Subject:** RE: PRECLEARED: James Richard Perry  
**Date:** Friday, January 06, 2017 7:54:20 PM

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Check that. I think we are set. Hope you all are enjoying a little Friday night time.

----- Message from Ann\_M\_Donaldson/JonesDay on Sat, 07 Jan 2017 00:51:01 GMT -----

**From:** Ann Donaldson  
**To:** "Deborah J. Bortot" , "Heather Jones"  
**Subject:** RE: PRECLEARED: James Richard Perry

Sorry to bother you on Friday night, but can one of you give me a call at (b)(6)

----- Message from "Deborah J. Bortot" on Fri, 06 Jan 2017 20:03:21 GMT -----

**From:** "Deborah J. Bortot"  
**To:** "Ann M Donaldson"  
"Jim Robertson" , "David J. Apol" , "Heather A. Jones" , "Sandra S. Mabry" ,  
**CC:** "Keith Labeledz" , "Teresa L. Williamson" , "Rodrick T. Johnson" , "Emory A. Rounds III" , "Beard, Susan"  
**Subject:** PRECLEARED: James Richard Perry

Annie, James Richard Perry is precleared.

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UNITED STATES OFFICE OF  
GOVERNMENT ETHICS



JAN 10 2017

The Honorable Lisa Murkowski  
Chairman  
Committee on Energy and Natural  
Resources  
United States Senate  
Washington, DC 20510

Dear Madam Chairman:

In accordance with the Ethics in Government Act of 1978, I enclose a copy of the financial disclosure report filed by James Richard Perry. President-Elect Trump has announced his intention to nominate Governor Perry for the position of Secretary, Department of Energy.

We have reviewed the report and have obtained advice from the agency concerning any possible conflict in light of its functions and the nominee's proposed duties. Also enclosed is an ethics agreement outlining the actions that the nominee will undertake to avoid conflicts of interest. Unless a date for compliance is indicated in the ethics agreement, the nominee must fully comply within three months of confirmation with any action specified in the ethics agreement.

Based thereon, we believe that this nominee is in compliance with applicable laws and regulations governing conflicts of interest.

Sincerely,

Walter M. Shaub, Jr.  
Director

Enclosures