**OGE Form 450 Review Worksheet for Jill Major Exercise**

|  |  |  |
| --- | --- | --- |
| **Part I: Assets/Income** | **Questions/More Information**  | **Substantive Issues** |
| City of Philadelphia(Former Employer) | 1. Position no longer held? Confirm
2. Defined benefit pension?
3. 457 Plan—any reportable investments/sector funds?
 | 1. Impartiality/ covered relationship w/ Philadelphia
2. 208 unlikely for defined benefit
3. 457 plan holdings (no 208 if diversified)
 |
| Pepco Salary & Pension | 1. Spousal current employment? Position?
2. Defined benefit pension?
3. Stock interests/Value?
4. 401K or other retirement/reportable holdings?
 | 1. 208 /Impartiality/covered relationship
2. Any 208 with duties/or prohibited holdings for agency
3. Any 208 for securities or sector fund holdings in retirement plan
 |
| Firsthand Technology Opportunities Fund (TEFQX) | 1. Sector fund? If so, value?
 | 1. 208 conflict or exemption
 |
| VMWare | 1. Stock/Value?
 | 1. 208 conflict-- Recusal/divestiture (unless 2640 exemptions apply depending on value)
 |
| **Part II Liabilities** | **Questions/More Information** | **Substantive Issues** |
| Nothing reported | 1. Confirm no reportable liabilities
 |  |
| **Part III Outside Positions** | **Questions/More Information** | **Substantive Issues** |
| CIO Executive Council | 1. Still a Board Member?
2. Any compensation?
3. Prior approval?
 | 1. 208 imputed interest (organization)-recusal/resignation?
2. Any 209 concerns with compensation/benefits
3. Misuse/impartiality concerns
 |
| City of Philadelphia | SEE Part I Qs | SEE Part I Issues |
| Electronic Frontier Foundation | 1. Nature of involvement
2. Reportable position?
3. Prior approval?
 | 1. No 208 imputed interest likely
2. Misuse/impartiality
3. Potential 205 for advocacy activities
 |
| **Part IV Agreements and Arrangements** | **Questions/More Information** | **Substantive Issues** |
| University of Maryland, College Park, MD | 1. What is being taught and when?
2. Employment status with university?
3. Prior approval?
 | 1. Any 2635.807 concerns
2. 208 imputed interest (organization)—recusal
3. Any 209 concerns with compensation/benefits
4. 205 representation bar
5. Misuse/impartiality concerns
 |
| City of Philadelphia 457 PlanDeferred Compensation | 1. Employer contributions?
2. May be over-reported on Part IV
3. Any reportable holdings for Part I?
 | 1. Any 209 concerns if employer contributing
2. Any 208 for reportable holdings
 |
| **Part V Gifts and Reimbursements** | **NE FILER****NOT APPLICABLE** | **NE FILER****NOT APPLICABLE** |