Ethics Guidance
CONFIDENTIAL FINANCIAL DISCLOSURE REPORTS – OGE FORM 450s

GENERAL INSTRUCTIONS

- You should answer all the questions at Step 2 on page 1 (mark either "yes" or "no" for each Part). If "no" is checked for each Part, you do not need to complete the rest of the report.
- Remember to sign and date the report.
- You must file the original with your signature; copies and electronic filings are not allowed.

PART I: ASSETS AND INCOME

- You must include your assets and the assets of your spouse and dependent children if over $1,000 and sources of your income if over $200 and your spouse's income if over $1,000, except that you do not need to report:
  - diversified mutual funds (meaning funds that do not focus on a specific industry sector, state, or foreign country);
  - money market funds;
  - Treasury notes, U.S. bonds, and Thrift Savings Plan (TSP) accounts.
- For an IRA or 401(k) account, you must list each asset in the account over $1,000 (except diversified mutual funds, cash, and money market funds).

PART II: LIABILITIES

- You must list any liability that exceeded $10,000 at any time in the reporting period, except you do not need to include a:
  - mortgage (even if on rental property),
  - student loan,
  - credit card account,
  - car or home furnishing loan, or
  - loans from a family member.

PART III: OUTSIDE POSITIONS

- You do not need to list a position with a religious, social, fraternal, or political organization.

PART IV: AGREEMENTS AND ARRANGEMENTS

- You must report pension arrangements with a former employer and indicate whether the pension fund is managed by the employer or independently.

PART V: GIFTS AND TRAVEL REIMBURSEMENTS

- You must report personal gifts and travel reimbursements totaling more than $350 but not payments for Government travel.
- You do not need to report gifts from relatives.