

Ethics in Brief: Keep it Safe! Don't Over-Report on Your OGE-278 Public Financial Disclosure Report



The STOCK Act was enacted into law on April 4, 2012. As one of the many new reporting and disclosure requirements of the Act, **Public Financial Disclosure Reports (OGE-278) submitted in 2012 will be electronically available on the Department's website.** Because of this new requirement in the law, we offer the following guidance to help you keep your personal information safe and avoid over-reporting:

OGE-278 REPORT

• **COVER PAGE**

- Use your official address and phone number.
 - Do not use your personal address or phone number.
- NEVER put your social security number, birth date, home address, home phone number, or spouse's or children's names on the form.

• **SCHEDULE A**

- When reporting spouse and dependent child assets DO NOT use names--Instead use S (for Spouse) and DC1, DC2, (for Dependent Child).
 - DO NOT include the names of family members in the name of a trust or other investment vehicle— use identifiers like S, DC1, DC2. Example: *The S Irrevocable Trust.*
- DO NOT include account numbers.
- DO NOT include street addresses of rental property or investment property—include only the city and state.

- **DO NOT** report the amount of your spouse's or dependent children's income. Report only the source and type of income (e.g., salary, consulting fees).
- **SCHEDULE B, Part I, Transactions**
 - **DO NOT** report transactions involving your personal residence—unless it is a rental property—then only include city and state of rental properties —**DO NOT** include street addresses.
 - **DO NOT** include account numbers.
 - **DO NOT** include spouse's or dependent children's names (See bullet in Schedule A above).
 - **IMPORTANT: FOR ANY ATTACHED BROKERAGE REPORTS reporting transactions -- Be sure to redact purely personal information such as social security numbers, birth date, account numbers, home addresses, and spouse's and dependent children's names.**
- **SCHEDULE B, Part II, Gifts, Reimbursements, and Travel Expenses**
 - **DO NOT** report anything received as a gift from a relative
 - **DO NOT** report a gift of travel for official travel
- **SCHEDULE C, Part I, Liabilities**
 - **Do NOT** report mortgages on personal residences unless rented out—**NOTE: Senate Confirmed Presidential Appointees are required to report mortgages on personal residences, but are not required to disclose the city/state of their personal residence(s).**
 - **DO NOT** report street addresses for rental properties— city/state only.

Questions: Call Office of Ethics (202) 720-2251 or daeo.ethics@dm.usda.gov