

Commonly Omitted Information

OGE Form 278e, Public Financial Disclosure Report

The following is a list of the financial interests that must be reported on the OGE Form 278e but that are often omitted from the first draft of a filer's report.

Assets and Income

- Each underlying holding (stocks, mutual funds, municipal bonds, government bonds, etc.) in the following investment vehicles held by you, your spouse, your dependent child:
 - Individual retirement account (IRA)
 - 401(k) account with a current or former employer
 - 403(b) account with current or former employer
 - Defined benefit plan with an entity other than the Federal Government
 - Brokerage account
 - Managed account (e.g., First Command accounts)
 - Asset management account
 - Any other investment account
 - Variable annuity
 - Variable life insurance
 - TIAA-CREF account
 - 529 or college savings plan – it is sufficient to report name of specific portfolio you/your spouse chose for plan and name of state/financial institution offering plan
 - Trust created by you, your spouse, or your dependent child
 - Irrevocable trust if you, your spouse, or your dependent child is beneficiary
- Spouse's employer (add description of line of business if not publicly traded company)
- Spouse's business (sole proprietorship, S Corp, etc.) and brief description of line of business
- Capital gains from sale of real estate
- Rental income from real estate
 - Sold the rental property during the reporting period?
 - Report rental income received prior to sale of the property.
 - Because you no longer own the property, select "none" as the value of the property.
- Capital gains from sale of stocks or mutual funds (include dividends, if any, paid before the sale)
- Brief description of line of business for stock that is not publicly traded
- Undeveloped land, even if not income-producing
- Royalties, advances for books and other published materials

Liabilities

- PAS and GOs only – mortgage on home (including primary residence, vacation home, second family home)

Agreements

- Your continued participation in retirement plan(s), other benefit plans with a former, non-Federal employer
- Reservists/Guard – continued employment with current civilian employer and continuing participation in retirement plan(s) and other benefit plans with current employer, if not the Federal Government

Positions (all of your non-Federal Government positions, both paid and unpaid)

- Trustee of any trust, including your own living trust
- Member of board of directors of non-profit organization
- Position with a professional organization
- Managing member of limited liability corporation (e.g., family LLC)
- Reservists/Guard – position (as employee or other) with current civilian employer, if not the Federal Government