Executive Branch Personnel
Public Financial Disclosure Report (OGE Form 278e)

Filer's Information

Spicer, Sean M
Press Secretary, White House
Date of Termination: 09/01/2017

Other Federal Government Positions Held During the Preceding 12 Months:
Officer, US Navy (reserves) (9/1999 - Present)

Electronic Signature - I certify that the statements I have made in this form are true, complete and correct to the best of my knowledge.

/s/ Spicer, Sean M [electronically signed on 08/31/2017 by Spicer, Sean M in Integrity.gov]

Agency Ethics Official's Opinion - On the basis of information contained in this report, I conclude that the filer is in compliance with applicable laws and regulations (subject to any comments below).
/s/ Passantino, Stefan, Certifying Official [electronically signed on 09/05/2017 by Passantino, Stefan in Integrity.gov]

Other review conducted by
/s/ Passantino, Stefan, Ethics Official [electronically signed on 09/05/2017 by Passantino, Stefan in Integrity.gov]

U.S. Office of Government Ethics Certification
/s/ Skalla, Daniel L, Certifying Official [electronically signed on 10/11/2017 by Skalla, Daniel L in Integrity.gov]
### 1. Filer's Positions Held Outside United States Government

<table>
<thead>
<tr>
<th>#</th>
<th>ORGANIZATION NAME</th>
<th>CITY, STATE</th>
<th>ORGANIZATION TYPE</th>
<th>POSITION HELD</th>
<th>FROM</th>
<th>TO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Republican National Committee</td>
<td>Washington, District of Columbia</td>
<td>Non-Profit</td>
<td>Chief Strategist and Communications Director</td>
<td>2/2011</td>
<td>1/2017</td>
</tr>
<tr>
<td>2</td>
<td>Trump for America, Inc.</td>
<td>Washington, District of Columbia</td>
<td>Presidential Transition Team</td>
<td>Senior Advisor</td>
<td>11/2016</td>
<td>1/2017</td>
</tr>
<tr>
<td>3</td>
<td>Washington International Trade Association</td>
<td>Washington, District of Columbia</td>
<td>Non-Profit</td>
<td>Board Member</td>
<td>7/2009</td>
<td>1/2017</td>
</tr>
<tr>
<td>4</td>
<td>National Defense Foundation</td>
<td>Washington, District of Columbia</td>
<td>Non-Profit</td>
<td>Board Member</td>
<td>7/2009</td>
<td>1/2017</td>
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### 2. Filer's Employment Assets & Income and Retirement Accounts

<table>
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<tr>
<th>#</th>
<th>DESCRIPTION</th>
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<th>VALUE</th>
<th>INCOME TYPE</th>
<th>INCOME AMOUNT</th>
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<tbody>
<tr>
<td>1</td>
<td>RNC Defined Contribution 401k Plan</td>
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<tr>
<td>1.1</td>
<td>Vanguard Target Retirement 2040</td>
<td>Yes</td>
<td>$100,001 - $250,000</td>
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<td>$2,501 - $5,000</td>
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<td>1.2</td>
<td>Vanguard Target Retirement 2050</td>
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<td>$50,001 - $100,000</td>
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<td>$2,501 - $5,000</td>
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<td>2</td>
<td>Chase Brokerage Retirement Account 1</td>
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<tr>
<td>2.1</td>
<td>JP Morgan Investor Growth FD CL A (ONGAX)</td>
<td>Yes</td>
<td>$15,001 - $50,000</td>
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<td>None (or less than $201)</td>
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<td>2.2</td>
<td>Perkins Mid Cap Value FD Class (JMCVX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
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<td>None (or less than $201)</td>
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<td>2.3</td>
<td>Royce Fund Premier Series (RYPRX)</td>
<td>Yes</td>
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<td>None (or less than $201)</td>
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<td>#</td>
<td>DESCRIPTION</td>
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<td>2.4</td>
<td>Oppenheimer Developing Markets Fund (ODMAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>2.5</td>
<td>Manning and Napier Fund World Opportunities (EXWAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>2.6</td>
<td>Growth Fund of America Class A (AGTHX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>2.7</td>
<td>American Century Equity Income Fund (TWEAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
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<td>None (or less than $201)</td>
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<td>2.8</td>
<td>Templeton Global Bond FD CL A (TPINX)</td>
<td>Yes</td>
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<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>2.9</td>
<td>Oppenheimer Global Strategic Income Fund (OPSIX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>2.10</td>
<td>Energy Transfer Partners LP (ETP)</td>
<td>No</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<tr>
<td>2.11</td>
<td>JP Morgan US Government Money Market Fund Instl (IJGXX)</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>3</td>
<td>Chase Brokerage Retirement Account 2</td>
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<tr>
<td>3.1</td>
<td>JP Morgan Investor Growth FD CL A (ONGAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>3.2</td>
<td>New Perspective Fund Inc Cl A (ANWPX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>$201 - $1,000</td>
<td>None (or less than $201)</td>
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<td>3.3</td>
<td>PIMCO Total Return Fund Cl A (PTTAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<tr>
<td>3.4</td>
<td>American Century Equity Income Fund (TWEAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>$201 - $1,000</td>
<td>None (or less than $201)</td>
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<td>3.5</td>
<td>Royce Fund Premier Series (RYPRX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>3.6</td>
<td>PIMCO All Asset All Authority A (PAUAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>3.7</td>
<td>Oppenheimer Developing Markets A (ODMAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<td>3.8</td>
<td>JP Morgan U.S. Government Money Market Fund Instl (IJGXX)</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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3. Filer's Employment Agreements and Arrangements

<table>
<thead>
<tr>
<th>#</th>
<th>EMPLOYER OR PARTY</th>
<th>CITY, STATE</th>
<th>STATUS AND TERMS</th>
<th>DATE</th>
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<tbody>
<tr>
<td>1</td>
<td>Republican National Committee</td>
<td>Washington, District of Columbia</td>
<td>I will continue to participate in this defined contribution plan, but the plan sponsor no longer makes contributions.</td>
<td>2/2011</td>
</tr>
<tr>
<td>2</td>
<td>Worldwide Speakers Group</td>
<td>Alexandria, Virginia</td>
<td>signing bonus received in exchange for exclusive representation in post government speaking engagements</td>
<td>9/2017</td>
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4. Filer's Sources of Compensation Exceeding $5,000 in a Year

(N/A) - Not required for this type of report

5. Spouse's Employment Assets & Income and Retirement Accounts

<table>
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<tr>
<th>#</th>
<th>DESCRIPTION</th>
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<th>VALUE</th>
<th>INCOME TYPE</th>
<th>INCOME AMOUNT</th>
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<tbody>
<tr>
<td>1</td>
<td>National Beer Wholesalers Association</td>
<td>N/A</td>
<td>salary, bonus</td>
<td></td>
<td></td>
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<td>2</td>
<td>National Beer Wholesalers Association Defined Contribution 401K Plan</td>
<td>No</td>
<td>None (or less than $1,001)</td>
<td>salary, bonus</td>
<td></td>
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<tr>
<td>2.1</td>
<td>Voya Intermediate Bond Port I</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>$1,001 - $2,500</td>
<td></td>
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<td>2.2</td>
<td>PIMCO Foreign Bond Fund</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>$1,001 - $2,500</td>
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<td>2.3</td>
<td>American Funds Washington Mutual R3</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>$5,001 - $15,000</td>
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<td>2.4</td>
<td>American Funds Fundamental Investors R3</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>$5,001 - $15,000</td>
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<td>2.5</td>
<td>Voya Russell Large Cap Index Port I</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>$5,001 - $15,000</td>
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<tr>
<td>#</td>
<td>DESCRIPTION</td>
<td>EIF</td>
<td>VALUE</td>
<td>INCOME TYPE</td>
<td>INCOME AMOUNT</td>
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<tr>
<td>2.6</td>
<td>American Funds Growth Fund R3</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $1,001)</td>
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<td>2.7</td>
<td>Franklin Small Cap Value VIP Fd2</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $1,001)</td>
<td>$5,001 - $15,000</td>
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<td>2.8</td>
<td>VY JPMorgan Mid Cap Value Portfolio Class I</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $1,001)</td>
<td>$2,501 - $5,000</td>
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<td>2.9</td>
<td>VY FMR Diversified Mid Cap Portfolio Class</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $1,001)</td>
<td>$5,001 - $15,000</td>
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<td>2.10</td>
<td>Voya Russell Small Cap Index Portfolio I</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $1,001)</td>
<td>$5,001 - $15,000</td>
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<td>2.11</td>
<td>VY Oppenheimer Global Portfolio Class I</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $1,001)</td>
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<td>2.12</td>
<td>Dodge &amp; Cox International Stock Fund</td>
<td>Yes</td>
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<td>None (or less than $1,001)</td>
<td>$5,001 - $15,000</td>
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<tr>
<td>2.13</td>
<td>Lazard Emerging Markets Equity Portfolio Open Shares</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $1,001)</td>
<td>$2,501 - $5,000</td>
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<td>3</td>
<td>National Beer Wholesalers Association Defined Contribution 401K Plan</td>
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<td>3.1</td>
<td>Principal Trust (SM) Target 2035 Fund</td>
<td>Yes</td>
<td>$500,001 - $1,000,000</td>
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<td>4</td>
<td>Northwestern Mutual IRA (Rollover Account)</td>
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<td>4.1</td>
<td>Columbia Acorn Fund Class A (LACAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<td>4.2</td>
<td>Columbia Acorn Select Fund Class A (LTFAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<td>5</td>
<td>Ameriprise Financial IRA (Roth Contributory)</td>
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<td>5.1</td>
<td>Columbia Contrarian Core Fund Class A (LCCAX)</td>
<td>Yes</td>
<td>$15,001 - $50,000</td>
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<td>5.2</td>
<td>Columbia Contrarian Core Fund Class B (LCCBX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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6. Other Assets and Income

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<th>DESCRIPTION</th>
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<th>INCOME TYPE</th>
<th>INCOME AMOUNT</th>
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<tbody>
<tr>
<td>1</td>
<td>Family Trust # 1</td>
<td>See Endnote</td>
<td>No</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<tr>
<td>1.1</td>
<td>Commercial Property - Newport RI</td>
<td>N/A</td>
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<tr>
<td>1.2</td>
<td>Residential Property - Barrington, RI</td>
<td>N/A</td>
<td>$500,001 - $1,000,000</td>
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<tr>
<td>1.3</td>
<td>Residential Property - Middletown, RI</td>
<td>N/A</td>
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<tr>
<td>2</td>
<td>Family Trust # 2</td>
<td>See Endnote</td>
<td>No</td>
<td>None (or less than $201)</td>
<td>None (or less than $201)</td>
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<tr>
<td>2.1</td>
<td>Commercial Property # 1 - Madison, AL</td>
<td>N/A</td>
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<tr>
<td>2.2</td>
<td>Commercial Property # 2 - Madison, AL</td>
<td>N/A</td>
<td>$250,001 - $500,000</td>
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<td>3</td>
<td>Investment Rental Properties</td>
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<tr>
<td>3.1</td>
<td>Residential real estate # 1 (Alexandria, VA)</td>
<td>N/A</td>
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<td>Rent or Royalties</td>
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<td>3.2</td>
<td>Residential real estate # 2 (Arlington VA)</td>
<td>N/A</td>
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<td>Rent or Royalties</td>
<td>$15,001 - $50,000</td>
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<td>3.3</td>
<td>Residential real estate # 3 (Alexandria, VA)</td>
<td>N/A</td>
<td>$100,001 - $250,000</td>
<td>Rent or Royalties</td>
<td>$5,001 - $15,000</td>
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<td>3.4</td>
<td>Residential real estate # 4 (Alexandria, VA)</td>
<td>N/A</td>
<td>$500,001 - $1,000,000</td>
<td>Rent or Royalties</td>
<td>$15,001 - $50,000</td>
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<td>4</td>
<td>RiverSource Retirement Advisor Advantage Variable Annuity (via Ameriprise Financial)</td>
<td>No</td>
<td>$15,001 - $50,000</td>
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<td>5</td>
<td>Nationwide Universal Life Insurance Policy</td>
<td>N/A</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
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<td>6</td>
<td>Chase Brokerage Account</td>
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<tr>
<td>#</td>
<td>DESCRIPTION</td>
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<td>INCOME TYPE</td>
<td>INCOME AMOUNT</td>
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<tr>
<td>6.1</td>
<td>Fairfax Cnty VA Redev &amp; Hsg Bonds</td>
<td>N/A</td>
<td>$1,001 - $15,000</td>
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<tr>
<td>6.2</td>
<td>iShares Tips Bond ETF (TIP)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
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<td>6.3</td>
<td>Barclays Bank Pref Shares (BCSPRD)</td>
<td>N/A</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<tr>
<td>6.4</td>
<td>Oppenheimer Developing Markets Fund (ODMAX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<tr>
<td>6.5</td>
<td>Oppenheimer Global Strategic Income Fund (OPSIX)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<tr>
<td>6.6</td>
<td>Sector SPDR Trust Consumer Staples (XLP)</td>
<td>Yes</td>
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<td>6.7</td>
<td>Exxon Mobil Corporation (XOM)</td>
<td>N/A</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<tr>
<td>6.8</td>
<td>iShares Barclays 7-10 Year Treasury Bond Fund (IEF)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<tr>
<td>6.9</td>
<td>Wal-Mart Stores Inc. (WMT)</td>
<td>N/A</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
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<tr>
<td>6.10</td>
<td>PowerShares Financial Preferred Portfolio ETF (PGF)</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
<td></td>
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<tr>
<td>6.11</td>
<td>JP Morgan Liquid Assets Money Market Fund (MJIIX)</td>
<td>Yes</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>ETrade Brokerage Account</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.1</td>
<td>Citigroup Inc (C)</td>
<td>N/A</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td></td>
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<tr>
<td>7.2</td>
<td>CVS Health Corporation (CVS)</td>
<td>N/A</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
<td></td>
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<tr>
<td>7.3</td>
<td>Home Depot Inc. (HD)</td>
<td>N/A</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
<td></td>
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<tr>
<td>7.4</td>
<td>Las Vegas Sands Corp (LVS)</td>
<td>N/A</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<td>7.5</td>
<td>Vanguard Growth ETF (VUG)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<tr>
<td>#</td>
<td>DESCRIPTION</td>
<td>EIF</td>
<td>VALUE</td>
<td>INCOME TYPE</td>
<td>INCOME AMOUNT</td>
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<tr>
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<td>--------------------</td>
<td>-------------</td>
<td>---------------------------</td>
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<td>7.6</td>
<td>Vanguard Value ETF (VTV)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<tr>
<td>7.7</td>
<td>Wal-Mart Stores Inc. (WMT)</td>
<td>N/A</td>
<td>None (or less than $1,001)</td>
<td>None (or less than $201)</td>
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<tr>
<td>8</td>
<td>Northwestern Mutual Brokerage Account</td>
<td>No</td>
<td></td>
<td>None (or less than $201)</td>
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</tr>
<tr>
<td>8.1</td>
<td>Northwestern Mutual Gen Money Market Fund Class B</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
<td></td>
</tr>
<tr>
<td>8.2</td>
<td>Columbia Large Cap Growth Fund Class C (LEGCX)</td>
<td>Yes</td>
<td>$15,001 - $50,000</td>
<td>None (or less than $201)</td>
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<td>9</td>
<td>Virginia (CollegeAmerica) 529 Savings Plan</td>
<td>No</td>
<td></td>
<td>None (or less than $201)</td>
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<tr>
<td>9.1</td>
<td>College 2027 Fund-529E (CTSEX) (Child 1)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<tr>
<td>9.2</td>
<td>College 2027 Fund-529E (CTSEX) (Child 2)</td>
<td>Yes</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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<td>10</td>
<td>Bank Accounts</td>
<td>No</td>
<td></td>
<td>None (or less than $201)</td>
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<tr>
<td>10.1</td>
<td>U.S. credit union account # 1 (cash)</td>
<td>N/A</td>
<td>$15,001 - $50,000</td>
<td>Interest</td>
<td>$201 - $1,000</td>
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<td>10.2</td>
<td>U.S. credit union account # 2 (cash)</td>
<td>N/A</td>
<td>$15,001 - $50,000</td>
<td>Interest</td>
<td>$201 - $1,000</td>
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<td>10.3</td>
<td>U.S. credit union account # 3 (cash)</td>
<td>N/A</td>
<td>$15,001 - $50,000</td>
<td>Interest</td>
<td>None (or less than $201)</td>
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<td>10.4</td>
<td>U.S. bank account # 1 (cash)</td>
<td>N/A</td>
<td>$1,001 - $15,000</td>
<td>Interest</td>
<td>None (or less than $201)</td>
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<td>11</td>
<td>Merck &amp; Co Inc</td>
<td>N/A</td>
<td>$1,001 - $15,000</td>
<td>None (or less than $201)</td>
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7. Transactions
### 8. Liabilities

<table>
<thead>
<tr>
<th>#</th>
<th>CREDITOR NAME</th>
<th>TYPE</th>
<th>AMOUNT</th>
<th>YEAR INCURRED</th>
<th>RATE</th>
<th>TERM</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Chase Bank</td>
<td>Mortgage (investment/rental property)</td>
<td>$50,001 - $100,000</td>
<td>2017</td>
<td>4.75</td>
<td>30 years</td>
</tr>
<tr>
<td>2</td>
<td>Wells Fargo Bank</td>
<td>Mortgage (investment/rental property)</td>
<td>$100,001 - $250,000</td>
<td>2017</td>
<td>4.65</td>
<td>30 years</td>
</tr>
<tr>
<td>3</td>
<td>Wells Fargo Bank</td>
<td>Mortgage (investment/rental property)</td>
<td>$100,001 - $250,000</td>
<td>2017</td>
<td>4.75</td>
<td>30 years</td>
</tr>
<tr>
<td>4</td>
<td>Lake Michigan Federal Credit Union</td>
<td>Mortgage (investment/rental property)</td>
<td>$250,001 - $500,000</td>
<td>2017</td>
<td>4.125</td>
<td>30 years</td>
</tr>
<tr>
<td>5</td>
<td>Chase Bank</td>
<td>Credit Card</td>
<td>$10,001 - $15,000</td>
<td>2010</td>
<td>9%</td>
<td>Revolving</td>
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<tr>
<td>6</td>
<td>USAA</td>
<td>Credit Card</td>
<td>$10,001 - $15,000</td>
<td>2000</td>
<td>9%</td>
<td>Revolving</td>
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<tr>
<td>7</td>
<td>U.S. Senate Federal Credit Union</td>
<td>Personal Loan</td>
<td>$15,001 - $50,000</td>
<td>2016</td>
<td>10.75%</td>
<td>5 years</td>
</tr>
<tr>
<td>8</td>
<td>US Senate Credit Union</td>
<td>Credit Card</td>
<td>$10,001 - $15,000</td>
<td>2016</td>
<td>9%</td>
<td>Revolving</td>
</tr>
</tbody>
</table>
9. Gifts and Travel Reimbursements

Endnotes

<table>
<thead>
<tr>
<th>PART</th>
<th>#</th>
<th>ENDNOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>1</td>
<td>Filer is future 1/3 beneficiary of this trust. Filer’s mother receives current income from the trust.</td>
</tr>
<tr>
<td>6.</td>
<td>2</td>
<td>Filer's spouse is beneficiary of this trust. She does not receive income from the trust.</td>
</tr>
</tbody>
</table>
Summary of Contents

1. Filer's Positions Held Outside United States Government

Part 1 discloses positions that the filer held at any time during the reporting period (excluding positions with the United States Government). Positions are reportable even if the filer did not receive compensation.

This section does not include the following: (1) positions with religious, social, fraternal, or political organizations; (2) positions solely of an honorary nature; (3) positions held as part of the filer's official duties with the United States Government; (4) mere membership in an organization; and (5) passive investment interests as a limited partner or non-managing member of a limited liability company.

2. Filer's Employment Assets & Income and Retirement Accounts

Part 2 discloses the following:

- Sources of earned and other non-investment income of the filer totaling more than $200 during the reporting period (e.g., salary, fees, partnership share, honoraria, scholarships, and prizes)
- Assets related to the filer's business, employment, or other income-generating activities that (1) ended the reporting period with a value greater than $1,000 or (2) produced more than $200 in income during the reporting period (e.g., equity in business or partnership, stock options, retirement plans/accounts and their underlying holdings as appropriate, deferred compensation, and intellectual property, such as book deals and patents)

This section does not include assets or income from United States Government employment or assets that were acquired separately from the filer's business, employment, or other income-generating activities (e.g., assets purchased through a brokerage account). Note: The type of income is not required if the amount of income is $0 - $200 or if the asset qualifies as an excepted investment fund (EIF).

3. Filer's Employment Agreements and Arrangements

Part 3 discloses agreements or arrangements that the filer had during the reporting period with an employer or former employer (except the United States Government), such as the following:

- Future employment
- Leave of absence
- Continuing payments from an employer, including severance and payments not yet received for previous work (excluding ordinary salary from a current employer)
- Continuing participation in an employee welfare, retirement, or other benefit plan, such as pensions or a deferred compensation plan
- Retention or disposition of employer-awarded equity, sharing in profits or carried interests (e.g., vested and unvested stock options, restricted stock, future share of a company's profits, etc.)

4. Filer's Sources of Compensation Exceeding $5,000 in a Year

Part 4 discloses sources (except the United States Government) that paid more than $5,000 in a calendar year for the filer's services during any year of the reporting period.
The filer discloses payments both from employers and from any clients to whom the filer personally provided services. The filer discloses a source even if the source made its payment to the filer's employer and not to the filer. The filer does not disclose a client's payment to the filer's employer if the filer did not provide the services for which the client is paying.

5. Spouse's Employment Assets & Income and Retirement Accounts

Part 5 discloses the following:

- Sources of earned income (excluding honoraria) for the filer’s spouse totaling more than $1,000 during the reporting period (e.g., salary, consulting fees, and partnership share)
- Sources of honoraria for the filer’s spouse greater than $200 during the reporting period
- Assets related to the filer’s spouse's employment, business activities, other income-generating activities that (1) ended the reporting period with a value greater than $1,000 or (2) produced more than $200 in income during the reporting period (e.g., equity in business or partnership, stock options, retirement plans/accounts and their underlying holdings as appropriate, deferred compensation, and intellectual property, such as book deals and patents)

This section does not include assets or income from United States Government employment or assets that were acquired separately from the filer's spouse's business, employment, or other income-generating activities (e.g., assets purchased through a brokerage account). Note: The type of income is not required if the amount of income is $0 - $200 or if the asset qualifies as an excepted investment fund (EIF). Amounts of income are not required for a spouse’s earned income (excluding honoraria).

6. Other Assets and Income

Part 6 discloses each asset, not already reported, that (1) ended the reporting period with a value greater than $1,000 or (2) produced more than $200 in investment income during the reporting period. For purposes of the value and income thresholds, the filer aggregates the filer's interests with those of the filer's spouse and dependent children.

This section does not include the following types of assets: (1) a personal residence (unless it was rented out during the reporting period); (2) income or retirement benefits associated with United States Government employment (e.g., Thrift Savings Plan); and (3) cash accounts (e.g., checking, savings, money market accounts) at a single financial institution with a value of $5,000 or less (unless more than $200 of income was produced). Additional exceptions apply. Note: The type of income is not required if the amount of income is $0 - $200 or if the asset qualifies as an excepted investment fund (EIF).

7. Transactions

Part 7 discloses purchases, sales, or exchanges of real property or securities in excess of $1,000 made on behalf of the filer, the filer's spouse or dependent child during reporting period.

This section does not include transactions that concern the following: (1) a personal residence, unless rented out; (2) cash accounts (e.g., checking, savings, CDs, money market accounts) and money market mutual funds; (3) Treasury bills, bonds, and notes; and (4) holdings within a federal Thrift Savings Plan account. Additional exceptions apply.
8. Liabilities

Part 8 discloses liabilities over $10,000 that the filer, the filer's spouse or dependent child owed at any time during the reporting period.

This section does not include the following types of liabilities: (1) mortgages on a personal residence, unless rented out (limitations apply for PAS filers); (2) loans secured by a personal motor vehicle, household furniture, or appliances, unless the loan exceeds the item's purchase price; and (3) revolving charge accounts, such as credit card balances, if the outstanding liability did not exceed $10,000 at the end of the reporting period. Additional exceptions apply.

9. Gifts and Travel Reimbursements

This section discloses:

- Gifts totaling more than $375 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.
- Travel reimbursements totaling more than $375 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.

For purposes of this section, the filer need not aggregate any gift or travel reimbursement with a value of $150 or less. Regardless of the value, this section does not include the following items: (1) anything received from relatives; (2) anything received from the United States Government or from the District of Columbia, state, or local governments; (3) bequests and other forms of inheritance; (4) gifts and travel reimbursements given to the filer's agency in connection with the filer's official travel; (5) gifts of hospitality (food, lodging, entertainment) at the donor's residence or personal premises; and (6) anything received by the filer's spouse or dependent children totally independent of their relationship to the filer. Additional exceptions apply.
Privacy Act Statement

Title I of the Ethics in Government Act of 1978, as amended (the Act), 5 U.S.C. app. § 101 et seq., as amended by the Stop Trading on Congressional Knowledge Act of 2012 (Pub. L. 112-105) (STOCK Act), and 5 C.F.R. Part 2634 of the U. S. Office of Government Ethics regulations require the reporting of this information. The primary use of the information on this report is for review by Government officials to determine compliance with applicable Federal laws and regulations. This report may also be disclosed upon request to any requesting person in accordance with sections 105 and 402(b)(1) of the Act or as otherwise authorized by law. You may inspect applications for public access of your own form upon request. Additional disclosures of the information on this report may be made: (1) to any requesting person, subject to the limitation contained in section 208(d)(1) of title 18, any determination granting an exemption pursuant to sections 208(b)(1) and 208(b)(3) of title 18; (2) to a Federal, State, or local law enforcement agency if the disclosing agency becomes aware of violations or potential violations of law or regulation; (3) to another Federal agency, court or party in a court or Federal administrative proceeding when the Government is a party or in order to comply with a judge-issued subpoena; (4) to a source when necessary to obtain information relevant to a conflict of interest investigation or determination; (5) to the National Archives and Records Administration or the General Services Administration in records management inspections; (6) to the Office of Management and Budget during legislative coordination on private relief legislation; (7) to the Department of Justice or in certain legal proceedings when the disclosing agency, an employee of the disclosing agency, or the United States is a party to litigation or has an interest in the litigation and the use of such records is deemed relevant and necessary to the litigation; (8) to reviewing officials in a new office, department or agency when an employee transfers or is detailed from one covered position to another; (9) to a Member of Congress or a congressional office in response to an inquiry made on behalf of an individual who is the subject of the record; (10) to contractors and other non-Government employees working on a contract, service or assignment for the Federal Government when necessary to accomplish a function related to an OGE Government-wide system of records; and (11) on the OGE Website and to any person, department or agency, any written ethics agreement filed with OGE by an individual nominated by the President to a position requiring Senate confirmation. See also the OGE/GOVT-1 executive branch-wide Privacy Act system of records.

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