

# PUBLIC FINANCIAL DISCLOSURE REPORTS SF 278s

## General Instructions

- Sign and date your report and keep a copy for your records.

## Schedule A – Assets and Income

- For each asset over \$1,000 in value, you should mark three categories:
  - the value of the asset at the end of the reporting period (December 31st),
  - the type of income (or that the asset is an Excepted Investment Fund (EIF)), and
  - the amount of income received during the reporting period.
- List the specific and complete name of each mutual fund.
  - For an IRA or 401(k) account or other retirement account, list:
    - each individual asset worth more than \$1,000 that is held in the account (e.g., each mutual fund, stock, etc.) and
    - the name of the financial institution in which the account is held.

## Schedule B - Part I – Transactions

- If you report a sale, report income over \$200 received from the sale on Schedule A (but mark the value of the asset as “None (or less than \$1,001”).

## Schedule B - Part II – Gifts

- Do not report gifts to the Department, such as payments for Government travel; report such agency gifts on forms CD 210 and SF 326.

## Schedule C - Part I – Liabilities

- Do not report a mortgage on your personal residence, unless the property produces rental income or is investment property.
- Do not report a car loan.

## Schedule C - Part II – Agreements

- List pensions on both Schedule A and Schedule C.

## Schedule D - Part I – Outside Positions

- If you received income from a position, report the specific amount of compensation received on Schedule A.

## Schedule D - Part II – Compensation

- This should be filled out only if this is your first report filed as a new employee (or new filer) or as a nominee.

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**A WORD ABOUT ETHICS**