

Report Type: Nominee Report

Year (Annual Report only):

Date of Appointment:

Date of Termination:

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

Filer's Information

Guilfoyle, Kimberly

Ambassador to Greece, Department of State

Other Federal Government Positions Held During the Preceding 12 Months:

None

Names of Congressional Committees Considering Nomination:

- Committee on Foreign Relations
-

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/ Guilfoyle, Kimberly [electronically signed on 02/12/2025 by Guilfoyle, Kimberly 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/ Kimball, Emily J, Certifying Official [electronically signed on 05/15/2025 by Kimball, Emily J in Integrity.gov]

Other review conducted by

U.S. Office of Government Ethics Certification

/s/ Bortot, Deborah, Certifying Official [electronically signed on 05/16/2025 by Bortot, Deborah in Integrity.gov]

1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME	CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO	
1	Tru Media LLC	West Palm Beach , Florida	LLC	Media Consultant	5/2018	Present	
2	Four Corners Fundraising LLC	New York , New York	LLC	Managing Member	8/2019	Present	
3	Make America Great Again Policies	Beverly , Massachusetts	Non-Profit	Political Consultant	3/2021	1/2023	
4	KGT Global Consulting LLC	West Palm Beach , Florida	LLC	Political Consultant	2/2021	Present	
5	KGT Ventures LLC	West Palm Beach , Florida	LLC	PR Consultant	5/2022	Present	
6	American Dream Corp	See Endnote	West Palm Beach , Florida	Corporation	CEO and Founder	1/2024	Present
7	Metropolitan Medspa LLC	Palm Beach Gardens , Florida	LLC	Managing Member	5/2024	Present	
8	KGT Productions LLC	West Palm Beach, Florida	LLC	Managing Member	1/2023	Present	
9	Polished Rice, Inc.	Wilmington , Delaware	Corporation	Founder, CEO & Director	2/2025	Present	
10	Make America Great Again, Again! Inc.	Beverly , Massachusetts	Non-Profit	National Finance Chair	4/2021	1/2023	

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	American Dream Corp (Spirits Branding) See Endnote	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
2	Metropolitan Medspa LLC (Spa)	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
3	KGT Global Consulting LLC (Business Consulting)	N/A	\$50,001 - \$100,000	Business Income	\$392,323
4	Tru Media LLC (Political Consulting)	N/A	\$15,001 - \$50,000	Business Income	\$30,000
5	KGT Ventures LLC (Branding Consulting)	N/A	\$1,001 - \$15,000	Business Income	\$398,329
6	KGT Productions LLC (Podcasting)	N/A	\$250,001 - \$500,000	Podcast Income	\$769,258
7	IRA Account	No			
7.1	Adidas AG Sponsored ADR (ADDYY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.2	Anheuser-Busch Inbev SA Sponsored ADR (Belgium) (BUD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.3	AstraZeneca PLC American Depositary Shares (AZN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.4	Flutter Entertainment PLC Ordinary Shares (FLUT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.5	Industria De Diseno Textil Intidtex Sa Unspponsored ADR (IDEXY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.6	LyondellBasell Industries NV (LYB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.7	Medtronic Plc (MDT)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.8	Novo Nordisk A/S Common Stock (NVO)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.9	Spotify Technology S.A. Ordinary Shares (SPOT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.10	Adobe, Inc. (ADBE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.11	Airbnb Inc. Class A Common Stock (ABNB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.12	Alphabet Inc Class C Capital Stock (GOOG)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.13	Alphabet Inc Class A Common Stock (GOOGL)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.14	Amazon.com, Inc. (AMZN)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.15	Amgen Inc. (AMGN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.16	Analog Devices, Inc. (ADI)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.17	Apple, Inc. (AAPL)	N/A	\$50,001 - \$100,000		None (or less than \$201)
7.18	Applovin Corporation Class A Common Stock (APP)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.19	Boeing Co (BA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.20	Broadcom, Inc. (AVGO)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.21	Cadence Design Systems, Inc. (CDNS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.22	CME Group, Inc. (CME)	N/A	\$15,001 - \$50,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.23	The Coca-Cola Co. (KO)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.24	Constellation Energy Corporation Common Stock (CEG)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.25	Costco Wholesale Corp. (COST)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.26	CrowdStrike Holdings Inc. Class A Common Stock (CRWD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.27	Danaher Corp. (DHR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.28	Elevance Health Inc. Common Stock (ELV)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.29	Eli Lilly & Co. (LLY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.30	Exxon Mobil Corp. (XOM)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.31	GE Aerospace Common Stock (GE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.32	General Dynamics Corp. (GD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.33	Goldman Sachs Group Inc (GS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.34	The Home Depot, Inc. (HD)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.35	Honeywell International, Inc. (HON)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.36	Intuitive Surgical, Inc. (ISRG)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.37	JPMorgan Chase & Co (JPM)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.38	KKR & Co., Inc. (KKR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.39	KLA Corp. (KLAC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.40	Lockheed Martin Corp. (LMT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.41	Mastercard, Inc. (MA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.42	McDonald's Corp. (MCD)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.43	Merck & Co., Inc. (MRK)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.44	Meta Platforms Inc. Class A Common Stock (META)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.45	Microsoft Corp. (MSFT)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.46	Mobileye Global Inc (MBLY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.47	Moody's Corp. (MCO)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.48	Morgan Stanley (MS)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.49	Netflix, Inc. (NFLX)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.50	NextEra Energy, Inc. (NEE)	N/A	\$1,001 - \$15,000		None (or less than \$201)

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7.51	NVIDIA Corp. (NVDA)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.52	Oracle Corp. (ORCL)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.53	Palo Alto Networks, Inc. (PANW)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.54	Procter & Gamble Co (PG)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.55	Progressive Corp. (PGR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.56	RTX Corporation Common Stock (RTX)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.57	salesforce.com, inc. (CRM)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.58	ServiceNow, Inc. (NOW)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.59	Southern Company (SO)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.60	Starbucks Corp. (SBUX)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.61	T-Mobile US, Inc. (TMUS)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.62	Tesla, Inc. (TSLA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.63	Texas Instruments Incorporated (TXN)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.64	Thermo Fisher Scientific, Inc. (TMO)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.65	The TJX Cos., Inc. (TJX)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.66	Uber Technologies, Inc. (UBER)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.67	Union Pacific Corp. (UNP)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.68	Vertex Pharmaceuticals, Inc. (VRTX)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.69	Visa, Inc. (V)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.70	Walmart, Inc. (WMT)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.71	The Walt Disney Co. (DIS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.72	Wells Fargo & Co. (WFC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.73	Workday, Inc. (WDAY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.74	Air Products and Chemicals, Inc. (APD)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.75	Cheniere Energy, Inc. (LNG)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.76	Datadog Inc. Class A Common Stock (DDOG)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.77	DexCom, Inc. (DXCM)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.78	eBay, Inc. (EBAY)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.79	Ecolab, Inc. (ECL)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.80	Edwards Lifesciences Corp. (EW)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.81	Fortive Corp. (FTV)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.82	The Hershey Co. (HSY)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.83	Hilton Worldwide Holdings, Inc. (HLT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.84	Las Vegas Sands Corp. (LVS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.85	Lennar Corp. (LEN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.86	Liberty Media Corp. (FWONA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.87	lululemon athletica, Inc. (LULU)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.88	Moderna Inc. Common Stock (MRNA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.89	Nasdaq, Inc. (NDAQ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.90	Snowflake Inc. Class A Common Stock (SNOW)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.91	State Street Corp. (STT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.92	Sysco Corp. (SYY)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.93	The Trade Desk, Inc. (TTD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.94	Truist Financial Corporation Common Stock (TFC)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.95	United Rentals, Inc. (URI)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.96	Vertiv Holdings LLC Class A Common Stock (VRT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.97	Warner Bros. Discovery Inc. Series A Common Stock (WBD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.98	Polaris Inc. (PII)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.99	U.S. bank (cash)	N/A	\$15,001 - \$50,000		None (or less than \$201)
7.100	Taiwan Semiconductor Manufacturing Company Ltd. (TSM)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.101	Cohen & Steers Preferred Securities and Income SMA Shares, Inc (PISHX)	Yes	\$100,001 - \$250,000		None (or less than \$201)
7.102	Arch Capital Group Ltd. Depositary Shares each Representing a 1/1000th Interest in a 4.550% Non-Cumulative Preferred Share Series G (ACGLN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.103	Algonquin Power & Utilities Corp. 6.20% Fixed-to-Floating Subordinated Notes Series 2019-A due July 1 2079 (AQNB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.104	AXIS Capital Holdings Ltd. (AXSPRE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.105	Enstar Group Limited Depositary Shares Each Representing 1/1000th of an interest in Preference Shares (ESGRP)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.106	RenaissanceRe Holdings Ltd. (RNRPRG)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.107	DigitalBridge Group Inc. (DBRGPRJ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.108	KeyCorp (KEYPRL)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.109	Lincoln National Corp. (LNCPRD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.110	M&T Bank Corp. (MTBPRJ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.111	National Storage Affiliates Trust (NSAPRA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.112	Regions Financial Corp. (RFPRC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.113	SCE Trust IV (SCEPRJ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.114	SCE Trust VII (SCEPRM)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.115	WESCO International, Inc. (WCCPRA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.116	Wells Fargo & Co. (WFCPRA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.117	Wells Fargo & Co. (WFCPRD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.118	Wells Fargo & Co. (WFCPRZ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.119	Aegon Funding Company LLC 5.10% Subordinated Notes due 2049 (AEFC)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.120	Allstate Corp (ALLPRH)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.121	Allstate Corp (ALLPRJ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.122	Apollo Global Management Inc. (APOS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.123	Athene Holding Ltd. (ATHPRA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.124	Athene Holding Ltd. (ATHPRC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.125	Athene Holding Ltd. (ATHPRE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.126	Bank of America Corp. (BACPRB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.127	Bank of America Corp. (BACPRK)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.128	Bank of America Corp. (BACPRM)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.129	Bank of America Corp. (BACPRN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.130	Bank of America Corp. (BACPRO)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.131	Bank of America Corp. (BACQ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.132	Bank of America Corp. (BACPRS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.133	The Carlyle Group Inc. 4.625% Subordinated Notes due 2061 (CGABL)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.134	CMS Energy Corporation 5.875% Junior Subordinated Notes due 2079 (CMSD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.135	Corebridge Financial Inc (CRBD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.136	DTE Energy Company 2020 Series G 4.375% Junior Subordinated Debentures due 2080 (DTB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.137	Equitable Holdings, Inc. (EQHPRC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.138	JPMorgan Chase & Co. (JPMPRC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.139	JPMorgan Chase & Co. (JPMPRD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.140	JPMorgan Chase & Co. (JPMPRK)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.141	JPMorgan Chase & Co. (JPMPRL)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.142	JPMorgan Chase & Co. (JPMPRM)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.143	KKR Group Finance Co. IX LLC 4.625% Subordinated Notes due 2061 (KKRS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.144	MetLife, Inc. (METPRE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.145	MetLife, Inc. (METPRF)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.146	Affiliated Managers Group Inc. 4.750% Junior Subordinated Notes due 2060 (MGRB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.147	Affiliated Managers Group Inc. 6.75% Junior Subordinated Notes Due 2064 (MGRE)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.148	Morgan Stanley (MSPRE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.149	Morgan Stanley (MSPRF)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.150	Morgan Stanley (MSPRI)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.151	Morgan Stanley (MSPRK)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.152	Morgan Stanley (MSPRO)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.153	Morgan Stanley (MSPRP)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.154	Morgan Stanley (MSPRQ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.155	NextEra Energy, Inc. (NEEPRN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.156	Public Storage (PSAPRI)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.157	Public Storage (PSAPRR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.158	Reinsurance Group of America, Inc. (RZC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.159	Southern Company (The) Series 2020A 4.95% Junior Subordinated Notes due January 30 2080 (SOJD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.160	Southern Company (SOJF)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.161	DBA Sempra 5.750% Junior Subordinated Notes due 2079 (SREA)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.162	AT&T Inc. 5.350% Global Notes due 2066 (TBB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.163	Truist Financial Corporation (TFCPRR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.164	TPG Operating Group II, LP 6.950% Fixed-Rate Junior Subordinated Notes due 2064 (TPGXL)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.165	U.S. Bancorp (USBPRP)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.166	U.S. Bancorp (USBPRR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.167	W.R. Berkley Corp. 5.7% Sub. Deb. 2058 (WRBPRES), bond	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.168	American Tower Corporation (REIT) (AMT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
7.169	Crown Castle International Corp. (CCI)	N/A	\$1,001 - \$15,000		None (or less than \$201)
8	Four Corners Fundraising LLC	N/A	None (or less than \$1,001)	Business Income	\$180,000

3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	KGT Productions LLC	West Palm Beach , Florida	My podcasting business will be inactive during my appointment and any outstanding client fees will be fixed before I enter government service.	1/2023
2	Polished Rice, Inc.	Wilmington , Delaware	I will step down from my position but will retain passive ownership interest in the company.	2/2025

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
3	Metropolitan Medspa LLC	Palm Beach Gardens , Florida	I will step down from my position but will retain passive ownership interest in the company.	5/2024
4	KGT Ventures LLC	West Palm Beach, Florida	My branding consulting business will be inactive during my appointment and any outstanding client fees will be fixed before I enter government service.	5/2022
5	KGT Global Consulting LLC	West Palm Beach , Florida	My business consulting business will be inactive during my appointment and any outstanding client fees will be fixed before I enter government service.	2/2021
6	Four Corners Fundraising LLC	New York , New York	My fundraising business will be inactive during my appointment and any outstanding client fees will be fixed before I enter government service.	8/2019
7	Tru Media LLC	West Palm Beach , Florida	My political consulting business will be inactive during my appointment and any outstanding client fees will be fixed before I enter government service.	5/2018

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

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES
1	KGT Productions LLC	West Palm Beach , Florida	Podcasting
2	KGT Ventures LLC	West Palm Beach , Florida	Branding Consulting
3	KGT Global Consulting LLC	West Palm Beach , Florida	Business Consulting
4	Tru Media, LLC	West Palm Beach , Florida	Political Consulting
5	Adelanto Healthcare Ventures (AHCV)	Austin, Texas	Media Consulting (client of KGT Global Consulting LLC)
6	Right for America Super PAC	Mclean , Virginia	Fundraising Services (client of Four Corners Fundraising LLC)

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES
7	Four Corners Fundraising LLC	New York, New York	Fundraising Services
8	Rumble Canada Inc.	Ontario, Outside U.S.	Podcasting (client of KGT Productions LLC)
9	Make America Great Again, Again! Inc.	Beverly , Massachusetts	Services as National Finance Chair

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

None

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Brokerage Account #1	No			
1.1	U.S. bank (cash)	N/A	\$15,001 - \$50,000		None (or less than \$201)
1.2	Taiwan Semiconductor Manufacturing Company Ltd. (TSM)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.3	Anheuser-Busch Inbev SA Sponsored ADR (Belgium) (BUD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.4	LyondellBasell Industries NV (LYB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.5	Medtronic Plc (MDT)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.6	Adobe, Inc. (ADBE)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.7	Alphabet, Inc. (GOOG)	N/A	\$15,001 - \$50,000		None (or less than \$201)
1.8	Amazon.com, Inc. (AMZN)	N/A	\$15,001 - \$50,000		None (or less than \$201)
1.9	Amgen Inc. (AMGN)	N/A	\$1,001 - \$15,000	Capital Gains Dividends	\$201 - \$1,000
1.10	Analog Devices, Inc. (ADI)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.11	Apple, Inc. (AAPL)	N/A	\$15,001 - \$50,000	Capital Gains Dividends	\$201 - \$1,000
1.12	CME Group, Inc. (CME)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.13	The Coca-Cola Co. (KO)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.14	Danaher Corp. (DHR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.15	Elevance Health Inc. Common Stock (ELV)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.16	Exxon Mobil Corp. (XOM)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.17	First Trust NASDAQ Cybersecurity ETF (CIBR)	Yes	\$50,001 - \$100,000		None (or less than \$201)
1.18	General Dynamics Corp. (GD)	N/A	\$1,001 - \$15,000	Capital Gains Dividends	\$1,001 - \$2,500
1.19	Goldman Sachs Group Inc (GS)	N/A	\$1,001 - \$15,000	Capital Gains Dividends	\$201 - \$1,000
1.20	The Home Depot, Inc. (HD)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.21	Honeywell International, Inc. (HON)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.22	JPMorgan Chase & Co (JPM)	N/A	\$15,001 - \$50,000	Capital Gains Dividends	\$1,001 - \$2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.23	KKR & Co., Inc. (KKR)	N/A	\$1,001 - \$15,000	Capital Gains Dividends	\$2,501 - \$5,000
1.24	KLA Corp. (KLAC)	N/A	\$1,001 - \$15,000	Capital Gains Dividends	\$201 - \$1,000
1.25	Lockheed Martin Corp. (LMT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.26	McDonald's Corp. (MCD)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.27	Merck & Co., Inc. (MRK)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.28	Microsoft Corp. (MSFT)	N/A	\$15,001 - \$50,000	Capital Gains Dividends	\$1,001 - \$2,500
1.29	Mobileye Global Inc (MBLY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.30	Morgan Stanley (MS)	N/A	\$15,001 - \$50,000	Capital Gains Dividends	\$1,001 - \$2,500
1.31	NextEra Energy, Inc. (NEE)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.32	Oracle Corp. (ORCL)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.33	Procter & Gamble Co. (PG)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.34	RTX Corporation Common Stock (RTX)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.35	salesforce.com, inc. (CRM)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.36	Southern Company (SO)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.37	Starbucks Corp. (SBUX)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.38	T-Mobile US, Inc. (TMUS)	N/A	\$15,001 - \$50,000	Capital Gains Dividends	\$1,001 - \$2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.39	Texas Instruments Incorporated (TXN)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
1.40	Thermo Fisher Scientific, Inc. (TMO)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.41	Union Pacific Corp. (UNP)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.42	Visa, Inc. (V)	N/A	\$1,001 - \$15,000	Capital Gains Dividends	\$1,001 - \$2,500
1.43	Walmart, Inc. (WMT)	N/A	\$15,001 - \$50,000	Capital Gains Dividends	\$1,001 - \$2,500
1.44	The Walt Disney Co. (DIS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.45	Wells Fargo & Co. (WFC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.46	Workday, Inc. (WDAY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.47	Air Products and Chemicals, Inc. (APD)	N/A	\$1,001 - \$15,000	Capital Gains Dividends	\$1,001 - \$2,500
1.48	Cheniere Energy, Inc. (LNG)	N/A	\$15,001 - \$50,000	Capital Gains Dividends	\$201 - \$1,000
1.49	eBay, Inc. (EBAY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.50	Ecolab, Inc. (ECL)	N/A	\$1,001 - \$15,000	Capital Gains Dividends	\$1,001 - \$2,500
1.51	First Trust Financials AlphaDEX Fund (FXO)	Yes	\$50,001 - \$100,000		\$2,501 - \$5,000
1.52	First Trust Dorsey Wright Dynamic Focus 5 ETF (FVC)	Yes	\$50,001 - \$100,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.53	Fortive Corp. (FTV)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.54	The Hershey Co. (HSY)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.55	Las Vegas Sands Corp. (LVS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.56	Lennar Corp. (LEN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.57	Liberty Media Corp. (FWONA)	N/A	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000
1.58	lululemon athletica, Inc. (LULU)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.59	Moderna Inc. Common Stock (MRNA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.60	Nasdaq, Inc. (NDAQ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.61	State Street Corp. (STT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.62	Sysco Corp. (SYY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.63	Truist Financial Corporation Common Stock (TFC)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.64	United Rentals, Inc. (URI)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.65	Warner Bros. Discovery Inc. Series A Common Stock (WBD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.66	Polaris Inc. (PII)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.67	Broadcom, Inc. (AVGO)	N/A	None (or less than \$1,001)	Capital Gains	\$1,001 - \$2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.68	Intuit, Inc. (INTU)	N/A	None (or less than \$1,001)	Capital Gains	\$1,001 - \$2,500
1.69	Airbnb Inc. Class A Common Stock (ABNB)	N/A	None (or less than \$1,001)	Capital Gains	\$1,001 - \$2,500
1.70	Airbus (EADSY)	N/A	None (or less than \$1,001)	Capital Gains	\$1,001 - \$2,500
1.71	Cohen & Steers Preferred Securities and Income SMA Shares, Inc (PISHX)	Yes	\$100,001 - \$250,000		\$5,001 - \$15,000
1.72	First Trust SSI Strategic Convertible Securities ETF (FCVT)	Yes	\$50,001 - \$100,000		\$201 - \$1,000
1.73	Arch Capital Group Ltd. Depositary Shares each Representing a 1/1000th Interest in a 4.550% Non-Cumulative Preferred Share Series G (ACGLN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.74	Algonquin Power & Utilities Corp. 6.20% Fixed-to-Floating Subordinated Notes Series 2019-A due July 1 2079 (AQNB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.75	AXIS Capital Holdings Ltd. (AXS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.76	Enstar Group Limited Depositary Shares Each Representing 1/1000th of an interest in Preference Shares (ESGRP)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.77	RenaissanceRe Holdings Ltd. (RNR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.78	DigitalBridge Group Inc. (DBRG)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.79	KeyCorp (KEY)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.80	Lincoln National Corp. (LNC)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.81	M&T Bank Corp. (MTB)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.82	National Storage Affiliates Trust (NSA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.83	Regions Financial Corp. (RF)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.84	SCE Trust IV (SCEPRJ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.85	SCE Trust VII (SCEPRM)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.86	WESCO International, Inc. (WCC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.87	Wells Fargo & Co. (WFCPRA)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.88	Wells Fargo & Co. (WFCPRD)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.89	Wells Fargo & Co. (WFCPRZ)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.90	Aegon Funding Company LLC 5.10% Subordinated Notes due 2049 (AEFC)	N/A	\$1,001 - \$15,000	Interest	\$201 - \$1,000
1.91	Allstate Corp (ALLPRH)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.92	Allstate Corp (ALLPRJ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.93	Apollo Global Management Inc. (APOS)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.94	Athene Holding Ltd. (ATHPRA)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.95	Athene Holding Ltd. (ATHPRC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.96	Athene Holding Ltd. (ATHPRE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.97	Bank of America Corp. (BACPRB)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.98	Bank of America Corp. (BACPRK)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.99	Bank of America Corp. (BACPRM)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.100	Bank of America Corp. (BACPRN)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.101	Bank of America Corp. (BACPRO)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.102	Bank of America Corp. (BACPRQ)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.103	Bank of America Corp. (BACPRS)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.104	The Carlyle Group Inc. 4.625% Subordinated Notes due 2061 (CGABL)	N/A	\$1,001 - \$15,000	Interest	\$201 - \$1,000
1.105	Corebridge Financial Inc. 6.375% Junior Subordinated Notes due 2064 (CRBD)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.106	DTE Energy Company 2020 Series G 4.375% Junior Subordinated Debentures due 2080 (DTB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.107	Equitable Holdings, Inc. (EQHPRC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.108	JPMorgan Chase & Co. (JPMPRD)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.109	JPMorgan Chase & Co. (JPMPRC)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.110	JPMorgan Chase & Co. (JPMPRK)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.111	JPMorgan Chase & Co. (JPMPRL)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.112	JPMorgan Chase & Co. (JPMPRM)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.113	KKR Group Finance Co. IX LLC 4.625% Subordinated Notes due 2061 (KKRS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.114	MetLife, Inc. (METPRE)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.115	MetLife, Inc. (METPRF)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.116	Affiliated Managers Group Inc. 4.750% Junior Subordinated Notes due 2060 (MGRB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.117	Affiliated Managers Group, Inc. 6.75% Junior Subordinated Notes Due 2064 (MGRE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.118	Morgan Stanley (MSPRE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.119	Morgan Stanley (MSPRF)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.120	Morgan Stanley (MSPRI)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.121	Morgan Stanley (MSPRK)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.122	Morgan Stanley (MSPRO)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.123	Morgan Stanley (MSPRP)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.124	Morgan Stanley (MSPRQ)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.125	NextEra Energy, Inc. 5.65% Series N Junior Subordinated Debentures due March 1, 2079 (NEEPRN), bond	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.126	Public Storage (PSAPRI)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.127	Public Storage (PSAPRR)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.128	Reinsurance Group of America, Inc. 7.125% Fixed-Rate Reset Sub. Deb. due 2052 (RZC), bond	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.129	Southern Company (The) Series 2020A 4.95% Junior Subordinated Notes due January 30 2080 (SOJD)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.130	Southern Company (The) Series 2025A 6.50% Junior Subordinated Notes due March 15, 2085 (SOJF)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.131	DBA Sempra 5.750% Junior Subordinated Notes due 2079 (SREA)	N/A	\$1,001 - \$15,000	Interest	\$201 - \$1,000
1.132	AT&T Inc. 5.350% Global Notes due 2066 (TBB)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.133	Truist Financial Corporation (TFCPRR)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
1.134	TPG Operating Group II LP 6.950% Fixed-Rate Junior Subordinated Notes due 2064 (TPGXL)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.135	U.S. Bancorp (USBPRP)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.136	U.S. Bancorp (USBPRR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.137	W.R. Berkley Corp. 5.7% Sub. Deb. 2058 (WRBPRES), bond	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.138	American Tower Corporation (REIT) (AMT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
1.139	Crown Castle International Corp. (CCI)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
2	Brokerage Account #2	No			
2.1	U.S. brokerage (cash)	N/A	\$1,001 - \$15,000		None (or less than \$201)
2.2	Goldman Sachs Investor Money Market Fund Class A Shares (FMEXX)	Yes	\$15,001 - \$50,000		None (or less than \$201)
2.3	PSQ Holdings Inc. (PSQH)	N/A	\$500,001 - \$1,000,000		None (or less than \$201)
3	U.S. bank (cash)	N/A	\$1,001 - \$15,000		None (or less than \$201)

7. Transactions

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

8. Liabilities

#	CREDITOR NAME	TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
1	Azure Funding	Boat Loan	\$100,001 - \$250,000	2024	6.99%	240 months
2	RBC Wealth Management	Exercised Line of Credit	\$250,001 - \$500,000	2022	VAR 6.4130%	Open
3	Valley National Bank	Mortgage on Personal Residence	\$1,000,001 - \$5,000,000	2021	3.25%	30 Year

9. Gifts and Travel Reimbursements

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

Endnotes

PART	#	ENDNOTE
1.	6	After the filing date, American Dream Corp. was dissolved, and I no longer hold this position.
2.	1	After the filing date, American Dream Corp. was dissolved, and its assets were transferred to Polished Rice, Inc.

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 (1) that ended the reporting period with a value greater than \$1,000 or (2) from which more than \$200 in income was received 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 (1) that ended the reporting period with a value greater than \$1,000 or (2) from which more than \$200 in income was received 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, (1) that ended the reporting period with a value greater than \$1,000 or (2) from which more than \$200 in investment income was received 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 in income was received). 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 the 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 (note: certain PAS nominees and appointees are required to report all mortgages); (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 \$480 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.
- Travel reimbursements totaling more than \$480 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 \$192 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

5 U.S.C. § 13101 et seq., and 5 C.F.R. Part 2634 of the U. S. Office of Government Ethics regulations require the reporting of this information. Failure to provide the requested information may result in separation, disciplinary action, or civil action. 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 5 U.S.C. §§ 13107 and § 13122(b)(1) 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 a source when necessary to obtain information relevant to a conflict of interest investigation or determination; (4) to the National Archives and Records Administration or the General Services Administration in records management inspections; (5) to the Office of Management and Budget during legislative coordination on private relief legislation; (6) when the disclosing agency determines that the records are arguably relevant to a proceeding before a court, grand jury, or administrative or adjudicative body, or in a proceeding before an administrative or adjudicative body when the adjudicator determines the records to be relevant to the proceeding; (7) to reviewing officials in a new office, department or agency when an employee transfers or is detailed from one covered position to another, a public financial disclosure report and any accompanying documents, including statements notifying an employee's supervising ethics office of the commencement of negotiations for future employment or compensation or of an agreement for future employment or compensation; (8) to a Member of Congress or a congressional office in response to an inquiry made on behalf of and at the request of an individual who is the subject of the record; (9) 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 this system of records; (10) on the OGE Website and to any person, department or agency, any written ethics agreement, including certifications of ethics agreement compliance, filed with OGE by an individual nominated by the President to a position requiring Senate confirmation; (11) on the OGE Website and to any person, department or agency, any certificate of divestiture issued by OGE; (12) on the OGE Website and to any person, department or agency, any waiver of the restrictions contained in Executive Order 13989 or any superseding executive order; (13) to appropriate agencies, entities and persons when there has been a suspected or confirmed breach of the system of records, the agency maintaining the records has determined that there is a risk of harm to individuals, the agency, the Federal Government, or national security, and the disclosure is reasonably necessary to assist in connection with the agency's efforts to respond to the suspected or confirmed breach or to prevent, minimize, or remedy such harm; and (14) to another Federal agency or Federal entity, when the agency maintaining the record determines that information from this system of records is reasonably necessary to assist the recipient agency or entity in responding to a suspected or confirmed breach or in preventing, minimizing, or remedying the risk of harm to individuals, the recipient agency or entity, the Federal Government, or national security. See also the OGE/GOVT-1 executive branch-wide Privacy Act system of records.

Public Burden Information

This collection of information is estimated to take an average of ten hours per response, including time for reviewing the instructions, gathering the data needed, and completing the form. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Program Counsel, U.S. Office of Government Ethics (OGE) 250 E Street, S.W., Suite 750, Washington, DC 20024-3249.

Pursuant to the Paperwork Reduction Act, as amended, an agency may not conduct or sponsor, and no person is required to respond to, a collection of information unless it displays a currently valid OMB (that control number 3209-0001, is displayed here and at the top of the first page of this OGE Form 278e).
