

What to Gather Before You Start Your Public Financial Disclosure Report

Before starting on your financial disclosure report, take time to gather your financial information. The items listed below apply to **you, your spouse, and your dependent child**, unless otherwise specified.

- Earnings by you or your spouse (including any honoraria)
- Retirement accounts for you or your spouse
- Names of your clients
- You or your spouse's assets with employers (e.g., restricted stock units, restricted stock, stock options, deferred compensation plans, short- or long-term incentive plans, etc.)
- Brokerage accounts
- College savings plans
- Annuities and life insurance (excluding term life)
- Your dependent child's assets (e.g., UTMA accounts, etc.)
- Holdings of trusts for the benefit of you, your spouse, or your dependent child (even if someone else established the trust)
- Holdings of trusts for which you or your spouse are paying the taxes
- Rental or other investment properties
- Other assets (e.g., stocks, bonds, investment funds, bank accounts, digital asset holdings, etc.)
- Liabilities
- Positions you hold, both paid and unpaid, outside the federal government