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ONE HUNDRED EIGHTEENTH CONGRESS

**U.S. House of Representatives**

COMMITTEE ON ETHICS

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April 12, 2024

**MEMORANDUM FOR ALL MEMBERS, OFFICERS, AND EMPLOYEES**

**FROM: Committee on Ethics**  
Michael Guest, Chairman  
Susan Wild, Ranking Member

**SUBJECT: Upcoming Financial Disclosure Clinics & Training**

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The due date for annual Financial Disclosure (FD) Reports is **May 15, 2024**.<sup>1</sup> FD Reports can be filed starting Monday, April 15, 2024. All Members are subject to financial disclosure filing requirements. House staff may be subject to financial disclosure filing requirements for a number of reasons, which include: 1) they are paid at or above the senior staff rate for 60 days (2 pay periods) or more during the calendar year, even if on a temporary basis; 2) they are designated a “principal assistant” for financial disclosure filing purposes by their employing Member; or 3) they are a shared employee of three or more offices, regardless of their rate of pay.<sup>2</sup> The Committee on Ethics (Committee) provides assistance to filers in a number of ways.

**Assistance Available For Your Financial Disclosure Filings**

First, the Committee’s nonpartisan staff is available to review FD Reports prior to submission for House Members, officers, and employees. Please note, the Committee will prioritize Member prescreen requests; therefore, staff should submit their prescreen request as early as possible. If staff prescreen requests are submitted close to the deadline, the Committee may not be able to complete the review before the deadline, and staff may need to request an extension. You may email your prescreen request to [financial.disclosure@mail.house.gov](mailto:financial.disclosure@mail.house.gov) with the subject line “Prescreen Request.”

Second, the Committee will offer seven Financial Disclosure Clinics prior to the May 15 deadline. The clinics give filers a chance to work closely with the financial disclosure staff to address individual filers’ questions. Filers should bring with them their laptop along with any

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<sup>1</sup>The Committee is authorized by statute to grant extensions of the annual filing deadline of up to ninety (90) days. Extensions may be requested through the [FD Online Reporting system](#); or by delivering the [paper extension request form](#) to [financial.disclosure@mail.house.gov](mailto:financial.disclosure@mail.house.gov).

<sup>2</sup> House officers and employees who were paid at the rate of \$141,022 (\$11,752 per month) for at least 60 days (2 pay periods for House employees) during 2023 will be required to file an FD Report by May 15, 2024. For 2024, the rate triggering disclosure is \$147,649 (\$12,304 per month) for at least 60 days (2 pay periods).

applicable materials from the attached checklist. The clinics also serve to help filers use the online filing system to input and submit FD Reports and Periodic Transaction Reports (PTR). **Please note that participation in the clinics will not satisfy any House-mandated training requirements.**

The date, time, and location for each clinic is provided below. Attendees are welcome to walk in at any time during the hours listed below. You can find the FD Instruction Guide and additional information about financial disclosure requirements on the [Committee's Website](#).

<b>Clinics</b>		
<b>Date</b>	<b>Time</b>	<b>Location</b>
<b>Monday, April 15</b>	1:00 pm - 3:00 pm EDT	LHOB B248
<b>Tuesday, April 16</b>	10:00 am - 12:00 pm EDT	LHOB B248
<b>Wednesday, April 17</b>	10:00 am - 12:00 pm EDT	LHOB B248
<b>Monday, April 22</b>	1:00 pm - 3:00 pm EDT	LHOB B248
<b>Thursday, April 25</b>	1:30 pm - 3:30 pm EDT	LHOB B248
<b>Monday, April 29</b>	10:00 am - 12:00 pm EDT	LHOB B248
<b>Tuesday, April 30</b>	2:00 pm - 4:00 pm EDT	LHOB B248

Third, the Committee will offer three Senior Staff Trainings before the May 15, deadline that **will** satisfy the additional hour of training required for senior staff for the 118<sup>th</sup> Congress but does not satisfy the annual ethics training. Senior Staff training provides additional ethics guidance to staff who are required to file FD Reports pursuant to the Ethics in Government Act (EIGA). This training will cover general information about the requirement to file FD Reports and Periodic Transaction Reports. The date, time, and location for each training is provided below.

To receive credit for this training, Senior Staff are **required to pre-register** by clicking on the links provided in the “Location” section. Training is being offered in-person or via Webex.

<b>Trainings</b>		
<b>Date</b>	<b>Time</b>	<b>Location</b>
<b>Thursday, April 18</b>	2:00 pm - 3:00 pm EDT	<a href="#">HVC 215 or via Webex</a>
<b>Tuesday, April 23</b>	10:00 am - 11:00 am EDT	<a href="#">HVC 215 or via Webex</a>
<b>Thursday, May 2</b>	2:00 pm - 3:00 pm EDT	<a href="#">HVC 215 or via Webex</a>

Finally, the Committee's nonpartisan staff can provide informal guidance to filers. Clinics and training sessions are offered as an additional service to the House. The Committee's nonpartisan staff is also available to provide one-on-one assistance. This includes meeting with a filer's spouse, accountant, or attorney to answer questions pertaining to financial disclosure reporting requirements. For assistance with financial disclosure questions or to schedule a meeting, please call the Committee at (202) 225-7103 or email the financial disclosure staff at [financial.disclosure@mail.house.gov](mailto:financial.disclosure@mail.house.gov).

The Committee strongly recommends that filers use the [FD Online Reporting system](#) to submit all filings. Filers can grant access to designated third-party preparers. A blank copy of the paper form can be downloaded from the [Committee's website](#). Committee staff will provide assistance to both paper filers and online filers. If you need to file electronically, but did not receive login information, or you have lost your temporary password, please contact the Legislative Resource Center at (202) 226-5200 for assistance.

If you have any questions, please contact the Committee at (202) 225-7103.