OGE Form 278e (Updated Nov. 2021) (Expires 11/30/24)
U.S. Office of Government Ethics; 5 C.F.R. part 2634 | Form Approved: OMB No. (3209-0001)

| Report Type:                     | Annual  | <u> </u> |
|----------------------------------|---------|----------|
| Year (Annual Report only):       | 2021    |          |
| Date of Appointment/Termination: | 1/20/21 |          |

#### UNITED STATES OFFICE OF GOVERNMENT ETHICS \* Preventing Conflicts of Interest in the Executive Branch

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

| Filer's Information                 |                                      |                      | · · · · · · · · · · · · · · · · · · ·           |  |
|-------------------------------------|--------------------------------------|----------------------|---|--|
| Last Name                           | First Name                           | MI                   | Position  | Agency                                   |
| Marsh                               | h David S                            |                      | Deputy Chief of Staff                           | Office of Personnel Management           |
| Other Federal Government Pe         | ositions Held During the Preceding   | 12 Months:           |   |  |
| None                                |                                      |                      |   | -  |
| Name of Congressional Com-          | mittee Considering Nomination (No    | ominees only):       |   |  |
|                                     |                                      |                      |   |  |
| Filer's Certification - I certify   | that the statements I have made in   | this report are true | e, complete and correct to the best of my kno   | owledge:                                 |
| Signature:                          | Marsh                                |                      | Date: 05/14/2022                                |  |
| A son our lithing / https://g. / hu | nion. On the basis of information of | contained in this r  | eport, I conclude that the filer is in complian | ace with applicable laws and regulations |
| (subject to any comments bel        |                                      | ontained in tins i   | eport, reductede that the mer is in compilar    | nee with applicable laws and regulations |
| Signature:                          | e Chifeet                            | L                    | Date: 5-25-22                                   |  |
| Other Review Conducted By           | <i>'</i> :                           |                      |   |  |
| Signature:                          |                                      |                      | Date:   |  |
| U.S. Office of Government E         | Ethics Certification (if required):  |                      |   | ·  |
| Signature:                          |                                      |                      | Date:   |  |
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|                                     |                                      |                      |   |  |
| Comments of Reviewing Off           | ficials:                             |                      |   |  |
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| File | r's Name  | Page Number |                   |               |      |    |  |  |  |  |  |
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|      | avid Marsh 1  |             |                   |               |      |    |  |  |  |  |  |
| Pa   | Part 1: Filer's Positions Held Outside United States Government |             |                   |               |      |    |  |  |  |  |  |
| #    | Organization Name   | City/State  | Organization Type | Position Held | From | То |  |  |  |  |  |
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| -   | er's Name Page Number yid Marsh                                   |  |                             |               |             |               |             |  |  |  |
| Dav | ort 2: Filer's Employment Assets & Income and Retirement Accounts |  |                             |               |             |               |             |  |  |  |
|     | Description   | EIF  | Value                       | ٠.            | Income Type | Income Amount |             |  |  |  |
| _   | ROTH IRA: PIMCO Stockplus Small Fund                              | Ye.▼   | \$1,001 - \$15,000          | ~             |             |               |             |  |  |  |
| 2.  | ROTH IRA: MSF/T (MSFT)  | No▼  | \$15,001 - \$50,000         | ~             |             |               |             |  |  |  |
| 3.  | ROTH IRA: JP Morgan Stock (JPST)                                  | No▼  | \$15,001 - \$50,000         | <b>V</b>      |             |               |             |  |  |  |
| 4.  | ROTH IRA: CORE FDIC Insured Deposit Swap                          | No▼  | None (or less than \$1,001) | ~             |             |               |             |  |  |  |
| 5.  | ROTH IRA: Amazon.com INC Stock (AMZN)                             | No▼  | \$1,001 - \$15,000          | <b>V</b> .    |             |               |             |  |  |  |
| 6.  | 401K: FID MID CAP IDX (FSMDX)                                     | Ye.▼   | \$1,001 - \$15,000          | <b>V</b>      |             |               |             |  |  |  |
| 7.  | 401K: VANG PRIMECAP ADM (VPMAX)                                   | Ye:▼   | \$1,001 - \$15,000          | <b>V</b>      | -           |               |             |  |  |  |
| 8.  | 401K: BR MSCI ACWI EX US R (WBRMAX)                               | Ye.▼   | \$1,001 - \$15,000          | ~             |             |               |             |  |  |  |
| 9.  | 403B: Fidelity Contrafund (FCNTX)                                 | Ye:▼   | \$1,001 - \$15,000          | <b>V</b>      |             |               |             |  |  |  |
| 10. | 403B: Fidelity Emerging Markets (FEMKX)                           | Ye.▼   | \$1,001 - \$15,000          | <b>Y</b>      |             | -             | 7           |  |  |  |
| 11. | 403B: Fidelity Worldwide (FWWFX)                                  | Ye:▼   | \$1,001 - \$15,000<br>      | ~             |             |               |             |  |  |  |
| 12. | 403B: Fidelity Low Priced Stock (FLPSX)                           | Ye.▼   | \$1,001 - \$15,000          | ~             | ,           |               |             |  |  |  |
| 13. | 403B: Fidelity Puritan (FPURX)                                    | Ye. 🕶  | \$1,001 - \$15,000          | ~             |             |               |             |  |  |  |
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| David Marsh  |                       |               |  |           |         |  |  |  |
| Part 3: Filer's Employment Agreements and Arrangements |                       |               |  |           |         |  |  |  |
|  | Employer or Party     | City/State    | Status and Terms   |           | Date    |  |  |  |
|  | Markle Foundation     | Washington DC | l will continue to participate in Markle's 403B. The sponsor will not make further contributions after my se | paration. | 06/2018 |  |  |  |
|  | Pew Charitable Trusts | Washington DC | l will continue to participate in Pew's 401K. The sponsor will not make further contributions after my sepa  | aration.  | 05/2017 |  |  |  |
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|         | avid Marsh   |            |                              |   |  |  |  |  |
| Da      | ort 4: Filer's Sources of Compensation Exceeding \$5,000 in a Year |            |                              |   |  |  |  |  |
| Pa<br># | Source Name  | City/State | Brief Description of Duties  |   |  |  |  |  |
| -       |  | City/State | Direct Description of Duties |   |  |  |  |  |
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| Dav | avid Marsh  |      |                             |          |             |               |    |  |  |
| Par | Part 5: Spouse's Employment Assets & Income and Retirement Accounts |      |                             |          |             |               |    |  |  |
|     | Description   | EIF  | Value                       |          | Іпсоте Туре | Income Amount |    |  |  |
| _   | Spouse Salary: United States Senate                                 |      |                             | <b>\</b> |             |               |    |  |  |
| 2.  | Souse 401K: Vangaurd Wellington Fund Admiral Shares                 | Ye:▼ | \$15,001 - \$50,000         | <b>V</b> |             |               |    |  |  |
| 3.  | opodeo it it is   |      | \$1,001 - \$15,000          | <b>~</b> |             |               |    |  |  |
| 4.  | Spuse 401K: CREF Money Market R3 (CREF M82046I-7)                   | Ye:▼ | None (or less than \$1,001) | ~        |             |               |    |  |  |
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| -   | Note: This is a public form. Do not include account numbers, street addresses, or family member names. See instructions for required information.  Page Number |      |                             |          |              |                          |   |  |  |
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| -   | ler's Name Page Number avid Marsh  |      |                             |          |              |                          |   |  |  |
| -   | art 6: Other Assets and Income   |      |                             |          |              |                          |   |  |  |
| #   | Description Description  | EIF  | Value                       |          | Income Type  | Income Amount            |   |  |  |
| 1.  | Joint Family Checking Account:   | N/A  | \$50,001 - \$100,000        | V        | Interest     | None (or less than \$201 | 1 |  |  |
| 2.  | Pesronal Checking Account  | N/A  | \$1,001 - \$15,000          | ¥        | Interest     | None (or less than \$201 |   |  |  |
| 3.  | (Spouse Brokerage): APPLE INC  | No▼  | None (or less than \$1,001) | <b>~</b> | Capital Gain | \$100,001 - \$1,000,000  |   |  |  |
| 4.  | (Spouse Brokerage): AMAZON INC   | No▼  | None (or less than \$1,001) | ~        | Capital Gain | \$15,001 - \$50,000      |   |  |  |
| 5.  | (Personal Brokerage): AMAZON INC   | No.▼ | None (or less than \$1,001) | <b>V</b> | Capital Gain | \$15,001 - \$50,000      |   |  |  |
| 6.  | (Personal Brokerage): Fidelity Select Biotech  | Ye:▼ | None (or less than \$1,001) | <b>V</b> | Capital Gain | \$15,001 - \$50,000      |   |  |  |
| 7.  | (Personal Brokerage): JP Morgan (JPST)   | No.▼ | None (or less than \$1,001) | <b>v</b> | Capital Gain | \$50,001 - \$100,000     |   |  |  |
| 8.  | Personal Brokerage (Cash)  | N/A  | \$1,001 - \$15,000          | ¥        | Interest     | None (or less than \$201 |   |  |  |
| 9.  | Personal Brokerage (APPLE Stock)   | No▼  | \$100,001 - \$250,000       | ¥        | Dividend     | \$201 - \$1,000          | 1 |  |  |
| 10. | Personal Brokerage (Carrier Global Corporation Stock)  | No▼  | \$1,001 - \$15,000          | ¥        | Dividend     | None (or less than \$201 |   |  |  |
| 11. | Personal Brokerage (Fidelity Select Software FSCX)   | Ye:▼ | \$15,001 - \$50,000         | •        | Dividend     | None (or less than \$201 |   |  |  |
| 12. | Personal Brokerage (MSFT Stock)  | No▼  | \$50,001 - \$100,000 [      | •        | Dividend     | \$201 - \$1,000          | 1 |  |  |
| 13. | Personal Brokerage (OTIS Worldwide Corp)   | No▼  | \$1,001 - \$15,000          | *        | Dividend     | None (or less than \$201 | 1 |  |  |
|     | Personal Brokerage (Procter and Gamble Stock)  | No₩  | \$15,001 - \$50,000         | V        | Dividend     | \$201 - \$1,000          | ] |  |  |
| 15. | Personal Brokerage (RTF Raytheon Technologies Stock)   | No▼  | \$1,001 - \$15,000          | V        | Dividend     | None (or less than \$201 |   |  |  |
| 16. | Personal Brokerage: SPDR 500 ETF (SPY)   | 1    | l .                         | ~        | Dividend     | \$201 - \$1,000          |   |  |  |
|     | Personal Brokerage Vangaurd International Growth VWIGX   | Ye:▼ | \$15,001 - \$50,000         | ~        | Dividend     | \$201 - \$1,000          | 1 |  |  |
| 18. | Spouse Brokerage: Alphabet INC Stock   | No▼  | \$100,001 - \$250,000       | <b>v</b> |              | -                        |   |  |  |
| 19. | Spouse Brokerage: Apple INC Stock  | No▼  | \$250,001 - \$500,000       | <b>v</b> | Dividend     | \$2,501 - \$5,000        | - |  |  |
| 20. | Spouse Brokerage: Amazon Stock   | No▼  | \$100,001 - \$250,000       | <b>V</b> |              |                          |   |  |  |

|          | er's Name                              |      |      | Page Number |
|----------|--|------|------|-------------|
|          | vid Marsh                              |      |      |             |
|          | rt 7: Transactions                     |      |      |             |
| #        | Description                            | Туре | Date | Amount      |
| 1.       | See previously submitted 278T reports. |      |      |             |
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| David Marsh         |               |      |        |               |      |      |  |  |  |
| Part 8: Liabilities |               |      |        |               |      |      |  |  |  |
| #                   | Creditor Name | Туре | Amount | Year Incurred | Rate | Term |  |  |  |
| 5                   | None          |      | _      |               |      |      |  |  |  |
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| Da                                      | vid Marsh                                |  |                |  |       |  |  |
| Part 9: Gifts and Travel Reimbursements |  |  |                |  |       |  |  |
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