

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

Filer's Information

KLIMCZAK, KATHERINE MAUGHAN

ASSOC DIR LEGIS PLCY & ANAL, OFFICE OF LEGISLATIVE POLICY & ANALYSIS

Date of Appointment: 10/23/2023

Other Federal Government Positions Held During the Preceding 12 Months:

Associate Director, Office of the Director

Electronic Signature - I certify that the statements I have made in this form are true, complete and correct to the best of my knowledge.

KLIMCZAK, KATHERINE MAUGHAN [electronically signed on 12/06/2023 by KLIMCZAK, KATHERINE MAUGHAN in NEES]

Agency Ethics Official 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).

PARK, SHERRI LEA [electronically signed on 05/02/2024 by PARK, SHERRI LEA in NEES]

Other review conducted by

#	COMMENTS	EMPLOYEE	DATE
1	Initial Review:03/27/2024. 04/29/2024- Compliant with all applicable rules. JuarezL 03/27/2024- Initial review completed. JuarezL	IC Reviewer - BONILLA JUAREZ, LIANA NOHEMY	3/27/2024 at 11:16 AM

U.S office of Government Ethics Certification

1. Filer's Positions Held Outside United States Government

None

2. Filer's Employment Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Center for Science in the Public Interest (401k) Fidelity Freedom 2050 Fund (FFFHX)	Y	\$1,001 to \$15,000		None (or less than \$201)
2	Roth IRA Fidelity Freedom 2045 Fund (FFFHX)	Y	\$50,001 to \$100,000		None (or less than \$201)

3. Filer's Employment Agreements and Arrangements

None

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

None

5. Spouse's Employment Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	CBRE (Google contractor)	N/A	0.00	Salary (non-government)	\$0.00
2	CUST ROTH IRA	Y	\$15,001 to \$50,000		None (or less than \$201)
3	CUST ROTH IRA (AMCAP Fund Class A Shares (AMCPX) (S)	N	\$15,001 to \$50,000		
4	CUST ROTH IRA (S)	N	\$100,001 to \$250,000		
5	CUST ROTH IRA AMCAP Fund Class F1 Shares (AMPFX) (S)	N	\$15,001 to \$50,000		
6	CUST ROTH IRA American SMALLCAP World Fund, Inc Class F1 Shares (SCWFX) (S)	N	\$1,001 to \$15,000		None (or less than \$201)
7	CUST ROTH IRA Capital World Growth & Income Fund Class A Shares (CWGIX) (S)	N	\$1,001 to \$15,000		

8	CUST ROTH IRA Capital World Growth & Income Fund Class F1 Shares (CWGFX) (S)	N	\$15,001 to \$50,000	None (or less than \$201)
9	CUST ROTH IRA New World Fund, Inc Class A Shares (NEWFX) (S)	N	\$1,001 to \$15,000	None (or less than \$201)
10	CUST ROTH IRA Washington Mutual Investors Fund Class A Shares (AWSHX) (S)	N	\$15,001 to \$50,000	None (or less than \$201)

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	DC Govt College Savings Plan Portfolio 2037 (DC)	N	\$1,001 to \$15,000		None (or less than \$201)
2	DC Govt College Savings Plan Portfolio 2037 (DC)	N	\$15,001 to \$50,000		None (or less than \$201)
3	Fidelity NH College Portfolio Plan (529)(DC)	N	\$15,001 to \$50,000		
4	US Bank #1 (J)	N	\$15,001 to \$50,000		None (or less than \$201)

7. Transactions

None

8. Liabilities

None

9. Gifts and Travel Reimbursements

None