

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

## Filer's Information

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McCormack, Brian V

Chief of Staff, Department of Energy

Date of Appointment: 02/27/2017

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Other Federal Government Positions Held During the Preceding 12 Months:

None

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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/ McCormack, Brian V [electronically signed on 02/21/2017 by McCormack, Brian V in Integrity.gov]

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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/ Gehringer, Katherine, Certifying Official [electronically signed on 02/28/2017 by Gehringer, Katherine in Integrity.gov]

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Other review conducted by

/s/ Gehringer, Katherine, Ethics Official [electronically signed on 02/28/2017 by Gehringer, Katherine in Integrity.gov]

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U.S. Office of Government Ethics Certification

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Data Revised 02/28/2017

Data Revised 02/24/2017

Data Revised 02/23/2017

Data Revised 02/22/2017

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Comments of Reviewing Officials (public annotations):

PART	#	REFERENCE	COMMENT
N/A	N/A	General	(02/28/2017, Gehringer, Katherine): 208: JP Morgan Chase, Intel, Exxon Mobil, Tesla 502: Edison Electric Institute

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## 1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME	CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	Edison Electric Institute	Washington, District of Columbia	Non-Profit	Vice President, External Affairs	1/2011	Present

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Edison Electric Institute	N/A		Salary/Bonus	\$555,611
2	Traditional IRA				
2.1	Vanguard Dividend Appreciation Index Admiral Cl.	Yes	\$1,001 - \$15,000		None (or less than \$201)
2.2	Vanguard Target Retirement 2045	Yes	\$1,001 - \$15,000		None (or less than \$201)
2.3	Vanguard Windsor II Investor Cl	Yes	\$1,001 - \$15,000		\$201 - \$1,000
2.4	Vanguard US Growth Investor Class	Yes	\$1,001 - \$15,000		None (or less than \$201)
3	Roth IRA				
3.1	Vanguard Emerging Markets Stock Index Investor Cl	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.2	Vanguard High Dividend Yield Index Investor Cl.	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.3	Vanguard Growth Index Investor Class	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.4	Vanguard Mid-Cap Index Admiral Shares	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.5	Royce Opportunity Inv Class	Yes	\$1,001 - \$15,000		\$201 - \$1,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3.6	iShares Russell 2000 ETF	Yes	\$1,001 - \$15,000		None (or less than \$201)
4	Edison Electric Institute Cooperative Savings Plan				
4.1	Delaware US Growth Fund Institutional Class	Yes	\$100,001 - \$250,000		\$5,001 - \$15,000
4.2	Vanguard 500 Index Fund Admiral Shares	Yes	\$15,001 - \$50,000		None (or less than \$201)
4.3	Vanguard Dividend Growth Fund	Yes	\$15,001 - \$50,000		\$201 - \$1,000
4.4	Vanguard REIT Index Fund Admiral Shares	Yes	\$15,001 - \$50,000		\$201 - \$1,000
4.5	Vanguard Target Retirement Income Fund	Yes	\$50,001 - \$100,000		\$201 - \$1,000
5	Edison Electric institute Supplemental Benefit Plan				
5.1	Delaware US Growth	Yes	\$15,001 - \$50,000		\$1,001 - \$2,500
5.2	Dodge & Cox Stock Fund	Yes	\$1,001 - \$15,000		\$201 - \$1,000
5.3	Vanguard REIT Index Admiral Shares	Yes	\$1,001 - \$15,000		None (or less than \$201)
5.4	Vanguard Target Retirement 2060	Yes	\$1,001 - \$15,000		\$201 - \$1,000
5.5	Vanguard Target Retirement Income	Yes	\$1,001 - \$15,000		None (or less than \$201)

### 3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	Edison Electric Institute	Washington, District of Columbia	Cooperative Savings Plan -- Filer and employer will cease donations to defined contribution plan after filer leaves employment	1/2011

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
2	Edison Electric Institute	Washington, District of Columbia	Supplemental Benefits Plan -- filer and employer will stop making donations to defined contribution plan after filer leaves employment.	1/2011

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

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES
1	Edison Electric Institute	Washington, District of Columbia	

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

None

#### 6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Vanguard Federal Money Market	Yes	\$1,001 - \$15,000		None (or less than \$201)
2	Vanguard Dividend Appreciation Index	Yes	\$1,001 - \$15,000		None (or less than \$201)
3	Vanguard Energy Fund Investor Shares	Yes	\$1,001 - \$15,000		None (or less than \$201)
4	Vanguard Growth Index Admiral Shares	Yes	\$15,001 - \$50,000		None (or less than \$201)
5	Vanguard Prime Money Market	Yes	\$1,001 - \$15,000		None (or less than \$201)
6	8x8 Inc - Common Stock	No	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7	Enable Midstream Partners Unit REPSTG LP	No	\$1,001 - \$15,000		None (or less than \$201)
8	Exxon Mobil Corp	No	\$1,001 - \$15,000		None (or less than \$201)
9	Intel Corporation - Common Stock	No	\$1,001 - \$15,000		None (or less than \$201)
10	JP Morgan Chase & Co	No	\$15,001 - \$50,000		None (or less than \$201)
11	Tesla Motors, Inc. - Common Stock	No	\$1,001 - \$15,000		None (or less than \$201)
12	BBT Checking Account	No	\$50,001 - \$100,000		None (or less than \$201)
13	Residential Real Estate	No	\$250,001 - \$500,000	Rent or Royalties	\$2,501 - \$5,000
14	Priamerica Bond Fund	Yes	\$1,001 - \$15,000		None (or less than \$201)
15	Northwestern Mutual Individual Retirement Annuity				
15.1	Credit Suisse Commodity Return Strategy	Yes	\$1,001 - \$15,000		None (or less than \$201)
15.2	Emerging Markets Equity MSA/MFS	Yes	\$1,001 - \$15,000		None (or less than \$201)
15.3	High Yield Bond MSA/Federated Investment Mgmt. Co.	Yes	\$1,001 - \$15,000		None (or less than \$201)
15.4	Index 400 MSA	Yes	\$1,001 - \$15,000		\$201 - \$1,000
15.5	Index 500 MSA	Yes	\$50,001 - \$100,000		\$1,001 - \$2,500
15.6	Index 600 MSA	Yes	\$1,001 - \$15,000		\$201 - \$1,000
15.7	International Equity MSA/Franklin Templeton	Yes	\$15,001 - \$50,000		\$201 - \$1,000
15.8	Russell Core Bond	Yes	\$15,001 - \$50,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
15.9	Russell Global Real Estate Securities	Yes	\$1,001 - \$15,000		None (or less than \$201)
16	Northwestern Mutual Personal Annuity				
16.1	Credit Suisse Commodity Return Strategy	Yes	\$1,001 - \$15,000		None (or less than \$201)
16.2	High Yield Bond MSA/Federated Investment Mgmt. Co.	Yes	\$1,001 - \$15,000		None (or less than \$201)
16.3	Northwestern Mutual Index 400 Stock Fund	Yes	\$1,001 - \$15,000		None (or less than \$201)
16.4	Northwestern Mutual Index 500 Stock Fund	Yes	\$1,001 - \$15,000		\$201 - \$1,000
16.5	Northwestern Mutual Index 600 Stock Fund	Yes	\$1,001 - \$15,000		None (or less than \$201)
16.6	Inflation Protection MSA/American Century	Yes	\$1,001 - \$15,000		None (or less than \$201)
16.7	International Equity MSA/Franklin Templeton	Yes	\$1,001 - \$15,000		None (or less than \$201)
16.8	Russell Global Real Estate Securities	Yes	\$1,001 - \$15,000		None (or less than \$201)
16.9	Russell Non-US	Yes	\$1,001 - \$15,000		None (or less than \$201)
17	Northwestern Mutual Life Insurance 1 (Whole Life)	Yes	\$1,001 - \$15,000		None (or less than \$201)
18	Northwestern Mutual Life Insurance 2 (Whole Life)	Yes	\$100,001 - \$250,000		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	National Cooperative Bank	Mortgage (investment/rental property)	\$100,001 - \$250,000	2011	4.5	30

## 9. Gifts and Travel Reimbursements

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

## Endnotes