**Executive Branch Personnel PUBLIC FINANCIAL DISCLOSURE REPORT**

<table>
<thead>
<tr>
<th>Date of Appointment, Candidate's Election of Nomination (Month, Day, Year)</th>
<th>Reporting Individual's Name</th>
<th>Position for Which Filing</th>
<th>Location of Present Office (or forwarding address)</th>
<th>Address (Number, Street, City, State, and ZIP Code)</th>
<th>Title of Position(s) and Date(s) Held</th>
<th>Presidential Nominees Subject to Senate Confirmation</th>
<th>Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/23/09</td>
<td>KOCHER ROBERT</td>
<td>SPECIAL ASSISTANT TO THE PRESIDENT</td>
<td>EEOB Room 490</td>
<td></td>
<td></td>
<td></td>
<td>Robert Kocher</td>
</tr>
</tbody>
</table>

**Date of Filing:** 2/20/09

**Signature of Designated Agency Ethics Official/Reviewing Official:**

3/14/09

**Agency Ethics Official's Opinion:**

3/18/09

**Office of Government Ethics Use Only:**

**Comments of Reviewing Officials (if additional space is required, use the reverse side of this sheet):**

(Check box if filing extension granted & indicate number of days) [ ]

(Check box if comments are continued on the reverse side) [ ]

---

Any individual who is required to file this report and does so more than 30 days after the date the report is required to be filed, or, if an extension is granted, more than 30 days after the last day of the filing extension period shall be subject to a $200 fee.

**Reporting Periods:**
- **Incumbents:** The reporting period is the preceding calendar year except Part II of Schedule C and Part I of Schedule D where you must also include the filing year up to the date you file. Part II of Schedule D is not applicable.
- **Termination Filers:** The reporting period begins at the end of the period covered by your previous filing and ends at the date of termination. Part II of Schedule D is not applicable.
- **Nominees, New Entrants and Candidates for President and Vice President:**
  - **Schedule A—The reporting period for income (BLOCK C) is the preceding calendar year and the current calendar year up to the date of filing. Value assets as of any date you choose that is within 31 days of the date of filing.**
  - **Schedule B—Not applicable.**
  - **Schedule C, Part I (Liabilities)—The reporting period is the preceding calendar year and the current calendar year up to any date you choose that is within 31 days of the date of filing.**
  - **Schedule C, Part II (Agreements or Arrangements)—Show any agreements or arrangements as of the date of filing.**
  - **Schedule D—The reporting period is the preceding two calendar years and the current calendar year up to the date of filing.**

Supersedes Prior Editions. Which Cannot Be Used

Form Designed in Microsoft Excel 2000

NSN 7540-01-970-8444
SCHEDULE A

### Assets and Income

**BLOCK A**

For you, your spouse, and dependent children, report each asset held for investment or the production of income which had a fair market value exceeding $1,000 at the close of the reporting period, or which generated more than $200 in income during the reporting period, together with such income.

For yourself, also report the source and actual amount of earned income exceeding $200 (other than from the U.S. Government). For your spouse, report the source but not the amount of earned income of more than $1,000 (except report the actual amount of any honoraria over $200 of your spouse).

None [ ]

**Examples**
- Doe Jones & Smith, Hometown State
- Kompogne Equity Fund
- IRA Heartland 300 Index Fund

**1. Columbia Value and Resir - UMBIX**

**2. Fidelity Advisor New Insights - FINSX**

**3. Harbor International - HIIIX**

**4. Hartford Growth - HGQAX**

**5. Ivy Asset Strategy - WASYX**

**6. Janus Adviser Forty - JDACX**

### Valuation of Assets

**BLOCK B**

Valuation at close of reporting period:

- $1,000 - $5,000
- $5,000 - $10,000
- $10,000 - $25,000
- $25,000 - $50,000
- $50,000 - $100,000
- $100,000 - $250,000
- $250,000 - $500,000
- $500,000 - $1,000,000
- $1,000,000 - $2,500,000
- $2,500,000 - $5,000,000
- $5,000,000 - $10,000,000
- $10,000,000 - $25,000,000
- Over $25,000,000

### Income

**BLOCK C**

Income: type and amount. If "None (or less than $209)" is checked, no other entry is needed in Block C for that item.

<table>
<thead>
<tr>
<th>Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

**Examples**
- Capital Gains
- Interest
- Dividends
- Capital Gain
- None (or less than $201)

**Date (Mo., Day, Yr.)**

**Only if Honoraria**

* This category applies only if the asset/income is solely that of the filer’s spouse or dependent children. If the asset/income is held that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.

Prior Editions Cannot be Used.
### SCHEDULE A continued

(Use only if needed)

#### Assets and Income

<table>
<thead>
<tr>
<th>BLOCK A</th>
<th>Valuation of Assets at close of reporting period</th>
<th>BLOCK B</th>
<th>BLOCK C</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Type</td>
<td>Amount</td>
<td>Other Income (Specify Type &amp; Actual Amount)</td>
</tr>
<tr>
<td></td>
<td>Eq.</td>
<td></td>
<td>Date (Mo. Day. Yr.)</td>
</tr>
<tr>
<td>None</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Jernigan Small Company - PSCZX
   JOINT CMA MFA
   X
2. Metropolitan West Total Return Bond Fund - MWTRX
   JOINT CMA MFA
   X
3. MFS Research Bond - MRBFX
   JOINT CMA MFA
   X
4. MFS Research International - MRSAFX
   JOINT CMA MFA
   X
5. Thornburg International - TGVIX
   JOINT CMA MFA
   X
6. Van Kampen Comstock - ACSTX
   JOINT CMA MFA
   X
7. Oppenheimer International - OIBAX
   JOINT CMA MFA
   X
8. OWS Dreman High Ret - KOHIX
   JOINT CMA MFA
   X
9. CMA TAX-EXEMPT FUND
   JOINT CMA MFA
   X

*This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.*

*Prior Editions Cannot be Used.*
<table>
<thead>
<tr>
<th>Block A</th>
<th>Block B</th>
<th>Block C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assets and Income</td>
<td>Valuation of Assets at close of reporting period</td>
<td>Income: Type and amount. If &quot;None (or less than $20,001)&quot; is checked, no other entry is needed in Block C for that item.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Type</td>
</tr>
<tr>
<td>1</td>
<td>Microsoft - MSFT JOINT BBA</td>
<td>X</td>
</tr>
<tr>
<td>2</td>
<td>ML&amp;Co. ARN SPX - NMO JOINT BBA</td>
<td>X</td>
</tr>
<tr>
<td>3</td>
<td>CD JPMorgan Chase JOINT BBA</td>
<td>X</td>
</tr>
<tr>
<td>4</td>
<td>Cohen &amp; Steers International - IREXX JOINT BBA</td>
<td>X</td>
</tr>
<tr>
<td>5</td>
<td>ML Bank Deposit Program JOINT BBA</td>
<td>X</td>
</tr>
</tbody>
</table>

* This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children mark the other highest categories of value, as appropriate.

Prior Editions Cannot be Used.
### Schedule A Continued

**Assets and Income**

**Block A**

<table>
<thead>
<tr>
<th>Name or Title (Box 3, 4)</th>
<th>Value at Close of Reporting Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>$0.00 - $10,000</td>
</tr>
<tr>
<td></td>
<td>$10,001 - $15,000</td>
</tr>
<tr>
<td></td>
<td>$15,001 - $25,000</td>
</tr>
<tr>
<td></td>
<td>$25,001 - $50,000</td>
</tr>
<tr>
<td></td>
<td>$50,001 - $100,000</td>
</tr>
<tr>
<td></td>
<td>Over $100,000</td>
</tr>
</tbody>
</table>

**Block B**

<table>
<thead>
<tr>
<th>Income Type</th>
<th>Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>None (or less than $201)</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

**Income: Type and Amount**

- **Income**
  - **Type**
    - Interest
    - Dividends
    - Royalties
    - Other Income
  - **Amount**
    - $0.00 - $10,000
    - $10,001 - $25,000
    - $25,001 - $50,000
    - $50,001 - $100,000
    - Over $100,000

**Note:** This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.
## SCHEDULE A continued

(Use only if needed)

### Assets and Income

<table>
<thead>
<tr>
<th>BLOCK A</th>
<th>Valuation of Assets at close of reporting period</th>
<th>BLOCK B</th>
<th>BLOCK C</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Type of Asset</td>
<td>Amount</td>
<td>Type of Income</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

1. Columbia Value and Rest - UMBIX
   BOB ROTH IRA MFA

2. Fidelity Advisor New Insights - FINSX
   BOB ROTH IRA MFA

3. Hartford Growth - HGOAX
   BOB ROTH IRA MFA

4. Janus Adviser Forty - JDCAK
   BOB ROTH IRA MFA

5. Jennison Small Company - PSCZX
   BOB ROTH IRA MFA

6. Metropolitan West Total Return Bond Fund - MWTRX
   BOB ROTH IRA MFA

7. MFS Research Bond - MRFKX
   BOB ROTH IRA MFA

8. MFS Research International - MRSAX
   BOB ROTH IRA MFA

9. Van Kampen Comstock - ACSTX
   BOB ROTH IRA MFA

### Notes:

- This category applies only if the asset/ income is solely that of the filer's spouse or dependent children. If the asset/ income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.

- Prior Editions Cannot be Used.
### Assets and Income

<table>
<thead>
<tr>
<th>BLOCK A</th>
<th>Valuation of Assets at close of reporting period</th>
<th>BLOCK B</th>
<th>BLOCK C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Model</td>
<td>Amount</td>
<td>Type</td>
</tr>
<tr>
<td>Columbia Value and Restr - UMBIX CINDY IRA MFA</td>
<td>$50,001 - $100,000</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Fidelity Advisor New Insights - FINSX CINDY IRA MFA</td>
<td>$250,001 - $500,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Van Kampen Comstock - ACSTX CINDY IRA MFA</td>
<td>$500,001 - $1,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brookings Institution Cindy Chan Full time employment</td>
<td>Over $1,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>McKinsey &amp; Company Robert Kocher Full time employment</td>
<td>Over $1,000,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.

Note: Other income (specify type & actual amount) Date (Mo., Day, Yr.) Only if Honoree
### Schedule A Continued

(Use only if needed)

#### Assets and Income

<table>
<thead>
<tr>
<th>Block A</th>
<th>Valuation of Assets at close of reporting period</th>
<th>BLOCK B</th>
<th>BLOCK C</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Name of security (1)</td>
<td>Amount of asset (2)</td>
<td>Type</td>
</tr>
<tr>
<td></td>
<td>Name of security (1)</td>
<td>Amount of asset (2)</td>
<td>Type</td>
</tr>
<tr>
<td></td>
<td>Name of security (1)</td>
<td>Amount of asset (2)</td>
<td>Type</td>
</tr>
</tbody>
</table>

**Income: type and amount.** If "None (or less than $20,000)" is checked, no other entry is needed in Block C for that item.

1. **Columbia Value and Restr - UMBIX CINDY ROTH IRA MFA**
   - Type: Other Income
   - Amount: $1,000.00
   - Date: 1/13/2009

2. **Fidelity Advisor New Insights - FINSX CINDY ROTH IRA MFA**
   - Type: Other Income
   - Amount: $1,000.00
   - Date: 1/13/2009

3. **Hartford Growth - HGDX CINDY ROTH IRA MFA**
   - Type: Other Income
   - Amount: $1,000.00
   - Date: 1/13/2009

4. **Janus Adviser Port - JDCA CINDY ROTH IRA MFA**
   - Type: Other Income
   - Amount: $1,000.00
   - Date: 1/13/2009

5. **Metropolitan West Total Return Bond Fund - MWTRX CINDY ROTH IRA MFA**
   - Type: Other Income
   - Amount: $1,000.00
   - Date: 1/13/2009

6. **MFS Research Bond - MMBFX CINDY ROTH IRA MFA**
   - Type: Other Income
   - Amount: $1,000.00
   - Date: 1/13/2009

7. **Van Kampen Comstock - ACSTX CINDY ROTH IRA MFA**
   - Type: Other Income
   - Amount: $1,000.00
   - Date: 1/13/2009

8. **Georgetown University Robert Kocher**
   - Type: Other Income
   - Amount: $1,000.00
   - Date: 1/13/2009

   - Type: Other Income
   - Amount: $1,000.00
   - Date: 1/13/2009

---

*This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value as appropriate.*

Prior Editions Cannot Be Used.
Do not Complete Schedule B if you are a new entrant, nominee, Vice Presidential or Presidential Candidate

Reporting Individual's Name
Kocher, Robert

SCHEDULE B

Part I: Transactions
Report any purchase, sale, or exchange by you, your spouse, or dependent children during the reporting period of any real property, stocks, bonds, commodity futures, and other securities when the amount of the transaction exceeded $1,000. Include transactions that resulted in a loss. Do not report a transaction involving property used solely as your personal residence, or a transaction solely between you, your spouse, or dependent child. Check the "Certificate of divestiture" block to indicate sales made pursuant to a certificate of divestiture from OGE.

<table>
<thead>
<tr>
<th>Identification of Assets</th>
<th>Transaction Type</th>
<th>Date (Mo., Day, Yr.)</th>
<th>Amount of Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Central Airlines Common</td>
<td>Purchase</td>
<td>2/1/99</td>
<td>None</td>
</tr>
</tbody>
</table>

* This category applies only if the underlying asset is solely that of the filer's spouse or dependent children. If the underlying asset is either held by the filer or jointly held by the filer with the spouse or dependent children, use the other higher categories of value, as appropriate.

Part II: Gifts, Reimbursements, and Travel Expenses
For you, your spouse and dependent children, report the source, a brief description, and the value of: (1) gifts (such as tangible items, transportation, lodging, food, or entertainment) received from one source totaling more than $260; and (2) travel-related cash reimbursements received from one source totaling more than $260. For conflicts analysis, it is helpful to indicate a basis for receipt, such as personal friend, agency approval under 5 U.S.C. § 4111 or other statutory authority, etc. For travel-related gifts and reimbursements, include travel itinerary, dates, and the nature of expenses provided. Exclude anything given to you by the U.S. Government; given to your agency in connection with official travel; received from relatives; received by your spouse or dependent child totally independent of their relationship to you; or provided as personal hospitality at the donor's residence. Also, for purposes of aggregating gifts to determine the total value from one source, exclude items worth $104 or less. See instructions for other exclusions.

<table>
<thead>
<tr>
<th>Source (Name and Address)</th>
<th>Brief Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Nati Assn. of Rock Collectors, NY, NY</td>
<td>Airline tickets, hotel room &amp; meals incident to national conference 6/15/99 (personal activity, unrelated to duty)</td>
<td>$500</td>
</tr>
<tr>
<td>Franti Jones, San Francisco, CA</td>
<td>Luggage briefcase (personal friend)</td>
<td>$300</td>
</tr>
</tbody>
</table>

Prior Editions Cannot Be Used.
## SCHEDULE C

### Part I: Liabilities

Report liabilities over $10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or dependent children. Check the highest amount owed during the reporting period. **Exclude** a mortgage on your personal residence unless it is rented out; loans secured by automobiles, household furniture or appliances; and liabilities owed to certain relatives listed in instructions. See instructions for revolving charge accounts.

<table>
<thead>
<tr>
<th>Creditors (Name and Address)</th>
<th>Type of Liability</th>
<th>Date Incurred</th>
<th>Interest Rate</th>
<th>Term of Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>First District Bank, Washington, DC</td>
<td>Mortgage on rental property, Delaware</td>
<td>1991</td>
<td>9%</td>
<td>25 yrs</td>
</tr>
<tr>
<td>John Jones, 123 J St., Washington, DC</td>
<td>Promissory note</td>
<td>1999</td>
<td>10%</td>
<td>on demand</td>
</tr>
</tbody>
</table>

### Part II: Agreements or Arrangements

Report your agreements or arrangements for: continuing participation in an employee benefit plan (e.g. 401k, deferred compensation); (2) continuation payment by a former employer (including severance payments); (3) leaves of absence; and (4) future employment. See instructions regarding the reporting of negotiations for any of these arrangements or benefits.

<table>
<thead>
<tr>
<th>Status and Terms of any Agreement or Arrangement</th>
<th>Parties</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pursuant to partnership agreement, will receive lump sum payment of capital account &amp; partnership share calculated on service performed through 1/00.</td>
<td>Doe Jones &amp; Smith, Hometown, State</td>
<td>7/85</td>
</tr>
</tbody>
</table>
# SCHEDULE D

## Part I: Positions Held Outside U.S. Government

Report any positions held during the applicable reporting period, whether compensated or not. Positions include but are not limited to those of an officer, director, trustee, general partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise or any non-profit organization or educational institution. **Exclude** positions with religious, social, fraternal, or political entities and those solely of an honorary nature.

<table>
<thead>
<tr>
<th>Organization (Name and Address)</th>
<th>Type of Organization</th>
<th>Position Held</th>
<th>From (Mo., Yr.)</th>
<th>To (Mo., Yr.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nat'l Assn. of Rock Collectors, NY, NY</td>
<td>Not-for-profit</td>
<td>President</td>
<td>6/92</td>
<td>Present</td>
</tr>
<tr>
<td>Doe Jones &amp; Smith, Hometown, State</td>
<td>Law firm</td>
<td>Partner</td>
<td>9/02</td>
<td>1/09</td>
</tr>
<tr>
<td>McKinsey &amp; Company</td>
<td>Consulting firm</td>
<td>Partner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>600 14th Street NW, Suite 200 Washington, DC 20005</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Part II: Compensation In Excess Of $5,000 Paid by One Source

Report sources of more than $5,000 compensation received by you or your business affiliation for services provided directly by you during any one year of the reporting period. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise, or any other non-profit organization when you directly provided the services generating a fee or payment of more than $5,000. You need not report the U.S. Government as a source.

<table>
<thead>
<tr>
<th>Source (Name and Address)</th>
<th>Brief Description of Duties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doe Jones &amp; Smith, Hometown, State</td>
<td>Legal services</td>
</tr>
<tr>
<td>Metro University (client of Doe Jones &amp; Smith), Moneytown, State</td>
<td>Legal services in connection with university construction</td>
</tr>
<tr>
<td><strong>McKinsey &amp; Company</strong></td>
<td>Management consulting</td>
</tr>
<tr>
<td>600 14th Street NW, Suite 200 Washington, DC 20005</td>
<td>- certain confidential clients are not reported</td>
</tr>
</tbody>
</table>

Prior Editions Cannot Be Used.