

2022 Financial Disclosure Information Packet for President John Williams

Attached is the 2022 Financial Disclosure Information Packet for John Williams, President of the Federal Reserve Bank of New York (“New York Fed” or “Bank”). This information packet contains Mr. Williams’ annual disclosure form for 2022 and related materials. No waivers were issued to Mr. Williams in 2022.

Mr. Williams’ 2022 Financial Disclosure Report. The New York Fed has a robust financial disclosure reporting regime which obligates most Bank employees to file on an annual basis one of four disclosure forms. These forms require the employee to disclose information about assets, liabilities, outside activities, gifts received, and other circumstances that might constitute an actual or potential conflict of interest or a violation of applicable law or Bank policy.

The New York Fed’s president completes the Report A Financial Disclosure Form, which requires the most extensive level of personal financial disclosure of any Federal Reserve Bank disclosure report. The president is required to disclose all assets and financial transactions over \$1,000 and give their approximate value by denoting the dollar range for each. Report A also requires disclosure of gifts received, liabilities, any agreements or arrangements for future employment or payment, outside activities, and other situations that might constitute an actual or apparent conflict of interest or violation of law or Bank policy. Note that this report also includes assets held by the spouse of the president, which are labeled accordingly.

The president’s financial disclosure reports are extensively reviewed for potential or actual conflicts of interest and compliance with applicable laws and policies. Reviews are conducted by the Chief Compliance and Ethics Officer of the Bank, the Chair of the Bank’s Board of Directors, and the Board of Governors’ Designated Agency Ethics Official. If legal issues are raised, the Bank’s General Counsel may also be asked to opine.

The Bank’s Rules related to Conflicts of Interests. Mr. Williams is subject to a number of policies related to his financial holdings and conflicts of interests. These policies are set forth in the Bank’s Code of Conduct, the Federal Reserve’s Guide to Conduct for Senior Officials and the Investment and Trading Policy for FOMC Officials.

FORM A

Federal Reserve Bank Of New York

FINANCIAL DISCLOSURE REPORT

Reporting Status <input checked="" type="checkbox"/> Incumbent (Check Appropriate <input type="checkbox"/> New Filer Box)	[For incumbent filers] Calendar Year Covered By Report 2022	Date of Appointment	<p style="text-align: center;">Reporting Periods</p> <p>Incumbents: The reporting period is the preceding calendar year except with regard to Part II of Schedule C and Schedule D where you must also include the filing year up to the date you file.</p> <p>New Filers: Schedule A-The reporting period for income is the preceding calendar year and the current calendar year up to the date of filing. Value assets as of any date that is less than 31 days before the date of filing.</p> <p>Schedule B-Not applicable.</p> <p>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 filing.</p> <p>Schedule C, Part II (Agreement or Arrangement)-Show any agreement or arrangement as of the date of filing.</p> <p>Schedule D, Part I (Outside Positions)-The reporting period is the preceding two calendar years and the current calendar year up to the date of filing.</p> <p>Schedule D, Part II (Other Situations)-The reporting period is as of the date of filing.</p>
Last Name		First Name and Middle Initial	
Williams		John	
Position			
President			
Certification	Signature of Reporting Individual	Date	
I CERTIFY that the statements I have made on this form and all attached schedules are true, complete and correct to the best of my knowledge and belief.	Signature	5/15/2023	
Reserve Bank Ethics Officer's Review	Signature or Reserve Bank Ethics Officer	Date	
On the basis of information contained in this report and in consultation with the Board's Designated Agency Ethics Official, I conclude that the filer is in compliance with applicable ethics laws and policies.	Signature	5/17/23	
Board Designated Agency Ethics Official's Review	Signature of Board Designated Agency Ethics Official	Date	
On the basis of information contained in this report and in consultation with the Reserve Bank Ethics Officer, I conclude that the filer is in compliance with applicable ethics laws and policies.	Signature	5/19/2023	
Comments of Reviewing Officials (If additional space is required, use the reverse side of this sheet)			
See attached comments.			
You may use a separate page if you need additional space to complete this Form A or any of its Schedules.		Check box if comments are continued on the reverse side) <input type="checkbox"/>	

General Information	
Name: John Williams	Reporting Period: 2022
Employee ID: [REDACTED]	
Reporting Status: Incumbent	
Date of Employment: 04/08/2002	
Group:	
Function:	
Department: FRBNY	
Job Title:	
Phone: 212-720-6180	
Form Status: Submitted	
<input checked="" type="checkbox"/> <p>This certifies that this report was submitted by the employee whose name appears above. This individual certifies that the information provided on this report and on all attached sections is true, complete and correct to the best of his/her knowledge and belief.</p>	
<p>Comments: 2022 TRANSACTIONS: the April 29, 2022 and November 1, 2022 purchases of Vanguard Target Retirement 2030 Fund listed on pg. 9 were made during the FOMC Blackout period. These are automatic payroll contributions by President Williams' spouse to her retirement account and are thus permissible during FOMC Blackout period. 2021 SCHEDULE A (ASSETS AND INCOME): President Williams disclosed the purchase of University of California UC Pathway 2040 Fund and University of California UC Pathway 2045 Fund in Schedule B (pg. 11) of his 2021 report. While the two funds were properly disclosed in Schedule B, they were inadvertently omitted from President Williams' list of assets in Schedule A of the report.</p>	

Chief Compliance / Ethics Officer Signature Date: 05/15/2023

Signature

Chairman / Board of Directors

Date: 5/18/2023

Schedule A

Name: John Williams

Reporting Period: 2022

Assets and Income

Please list each asset held in any accounts owned or controlled by you, your spouse, registered domestic partner or minor children that had a fair market value exceeding \$1,000 at the close of and/or generated over \$200 in income during the reporting period.

Please disclose any interest, regardless of its value, in: (i) depository institutions, primary dealers of government securities or their affiliates; (ii) savings and loan holding companies; (iii) systemically important financial institutions; (iv) financial market utilities; or (v) any entity with whom you conduct business on behalf of the Bank.

To remove an item, please click Remove below each line.

NOTE: If you have received a waiver from the Bank for an asset that you are reporting, please check the waiver box at the end of the asset line.

If you have no applicable assets to report, simply check the box below. Do not write "none" or "N/A."

I have no applicable assets to report:

Assets BLOCK A	Value of Assets at close of reporting period BLOCK B	Income: type and amount If None (or less than \$201), no other entry is needed in Block C for that item. BLOCK C		
Asset Name		Type / (If Other, specify)	Amount / Date Only if Honoraria	Waive r
Charles Schwab International Equity Index Fund (IRA) Owner: E - Employee	\$50,001-\$250K	Other Dividends/Capital Gains	\$1,001-\$25K	
AIG Fixed Account Plus (403B) Owner: S - Spouse	\$1,001-\$50K	Interest	\$201-\$1,000	
LVIP SSgA S&P 500 Index Fund (403B plan) Owner: S - Spouse	\$1,001-\$50K	Other Dividends/Capital Gains	\$201-\$1,000	
Fidelity Growth Portfolio (403B plan) Owner: S - Spouse	\$50,001-\$250K	Other Dividends/Capital Gains	\$201-\$1,000	

Schedule A

Name: John Williams

Reporting Period: 2022

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Asset Name		Type / (If Other, specify)	Amount / Date Only if Honoraria	Waive r
University of California UC Pathway 2040 Owner: S - Spouse	\$500,001-\$1,000K	Other Dividends/Capital Gains	\$1,001-\$25K	<input type="checkbox"/>
US Credit Union #1 (cash) Owner: J - Joint	\$1,001-\$50K	Interest	None(or less than \$201)	<input type="checkbox"/>
US Bank #1 (cash) Owner: S - Spouse	\$1,001-\$50K	Interest	None(or less than \$201)	<input type="checkbox"/>
Vanguard Institutional Target Date Retirement 2030 Fund (NYU) Owner: S - Spouse	\$50,001-\$250K	Other Dividends/capital gains	\$1,001-\$25K	<input type="checkbox"/>

Schedule A

Name: John Williams

Reporting Period: 2022

Assets and Income

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BLOCK A	BLOCK B	BLOCK C		
Asset Name		Type / (If Other, specify)	Amount / Date Only if Honoraria	Waiver
New York University (employer) Owner: S - Spouse	None(or less than \$1,001)	Other Salary	150,001-\$500K	<input type="checkbox"/>
US Bank #2 (cash) Owner: J - Joint	\$1,001-\$50K	Interest	None(or less than \$201)	<input type="checkbox"/>
US Brokerage Account (cash) Owner: E - Employee	\$1,001-\$50K	Interest	None(or less than \$201)	<input type="checkbox"/>
MSIF Growth A Fund (MSEGX) Owner: E - Employee	\$1,001-\$50K	Other Dividends/capital gains	\$1,001-\$25K	<input type="checkbox"/>

Schedule A

Name: John Williams

Reporting Period: 2022

Assets and Income

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Asset Name		Type / (If Other, specify)	Amount / Date Only if Honoraria	Waive r
MSIFT Global Strategy Fund (MBAAX) Owner: E - Employee	\$1,001-\$50K	Other Dividends/capital gains	\$201-\$1,000	<input type="checkbox"/>
MSIFT Discovery A Fund (MACGX) Owner: E - Employee	\$1,001-\$50K	Other Dividends/capital gains	\$201-\$1,000	<input type="checkbox"/>
Vanguard 500 Index Fund Admiral Shares Owner: E - Employee	None(or less than \$1,001)	Other Dividends/capital gains	\$201-\$1,000	<input type="checkbox"/>
Home in Sacramento, CA Owner: E - Employee	\$250,001-\$500K	Other House	None(or less than \$201)	<input type="checkbox"/>

Schedule A

Name: John Williams

Reporting Period: 2022

Assets and Income

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Asset Name		Type / (If Other, specify)	Amount / Date Only if Honoraria	Waive r
SavingsPlus Short-Term Investment Fund (457B) Owner: E - Employee	\$1,001-\$50K	Other Dividends/capital gains	None(or less than \$201)	
Fidelity VIP-Gvt Money Market Portfolio (Allstate variable annuity) Owner: E - Employee	\$1,001-\$50K	Other Dividends/capital gains	\$201-\$1,000	
Morgan Stanley VIF Growth Portfolio (Allstate variable annuity) Owner: E - Employee	\$50,001-\$250K	Other Dividends/capital gains	\$201-\$1,000	
Vanguard Federal Money Market Fund Owner: E - Employee	\$1,001-\$50K	Dividends	None(or less than \$201)	

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University of California Pathway 2045 Fund	\$1,001-\$50K	Dividends	None(or less than \$201)	
Owner: S - Spouse University of California Pathway 2035 Fund Owner: S - Spouse	\$250,001-\$500K	Dividends	None(or less than \$201)	

Schedule B

Name: John Williams

Reporting Period: 2022

Part I: Transactions

Report any purchase, sale or exchange by you **(E)**, your spouse or registered domestic partner **(S)**, you and your spouse or registered domestic partner **(J)** or a dependent child **(DC)** during the reporting period of any real estate, 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 real estate used solely as your personal residence (unless rented out), or a transaction solely between you, your spouse or dependent child. Check the "Required divestiture" block to indicate sales made pursuant to a divestiture required by the Bank.

")To remove an item, please click Remove below each line.

NOTE: If a transaction is a required divestiture directed by the Bank, please check the Req. Divestiture box at the end of the asset line.

If you have no applicable transactions to report, simply check the box below. Do not write "none" or "N/A."

I have no applicable transactions to report :

Identification of Assets	Owner	Transaction Type	Date (mm/dd/yyyy)	Amount of Transaction	Req. Divestiture
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	01/03/2022	\$1,001-\$50K	
Vanguard 500 Index Fund Admiral Shares	E	Sale	11/23/2022	\$1,001-\$50K	
Savings Plus 457 Short-term Investment Fund	S	Sale	11/23/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	02/01/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	03/01/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	04/01/2022	\$1,001-\$50K	

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Retirement 2030 Fund (monthly automatic payroll deductions)					
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	04/29/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	06/01/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	07/01/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	08/01/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	09/01/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	09/30/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	11/01/2022	\$1,001-\$50K	
Vanguard Institutional Target Date Retirement 2030 Fund (monthly automatic payroll deductions)	S	Purchase	12/01/2022	\$1,001-\$50K	

Part II: Gifts

To the extent not previously reported in writing, report the source, a brief description, and the value of any of the following received by you, your spouse or domestic partner or child: (1) any single gift having a value of \$20 or more from one covered source*; and (2) any other gifts totaling \$20 or more in value from one covered source. Exclude gifts from relatives and other exempt gifts.

To remove an item, please click Remove below each line.

* A covered source is a person or entity that: (1) does, or seeks to do, business with the Bank; (2) is supervised by the Federal Reserve System; or (3) has interests that are substantially affected by your duties at the Bank. Additionally, an organization, a majority of whose members are covered sources, is also considered a covered source.

If you have no applicable gifts to report, simply check the box below. Do not write "none" or "N/A."

I have no applicable gifts to report :Yes

Source(Name and Address)	Brief Description	Value
		\$ 0

Schedule C

Name: John Williams

Reporting Period: 2022

Part I: Liabilities

Report any liabilities owed during the reporting period to any of the following by you, your spouse, registered domestic partner, or dependent children: a bank, credit union, savings and loan association, savings bank, trust company, bank holding company, thrift holding company, an affiliate or subsidiary of any of the foregoing, and any entity which, to your knowledge, does or seeks to do business with the Bank.

To remove an item, please click Remove below each line.

If you have no applicable liabilities to report, simply check the box below. Do not write "none" or "N/A."

I have no applicable liabilities to report:

Creditor (Name and Address)	Type of Liability	Debtor (If Other, specify)	Category of Amount or Value
Chase	Credit Cards	Joint	0-\$50K
Bank of America	Credit Cards	Joint	0-\$50K
First Republic Bank (San Francisco, CA)	First mortgage on residence	Joint	\$150,001-500K

To your knowledge, were any of the foregoing extensions of credit more favorable than offered to a person not employed by the Bank? NO

Part II: Agreements or Arrangements

Report any agreement or arrangement for future employment, leave of absence from or continuation of payment by a former employer (including severance payments), or continuing participation in an employee benefit plan or deferred compensation arrangement. This part applies only to the person filing the report, and not to spouses, registered domestic partners, or children.

To remove an item, please click Remove below each line.

If you have no applicable agreements or arrangements to report, simply check the box below. Do not write "none" or "N/A."

I have no applicable agreements or arrangements to report: Yes

Status and Terms of any Agreement or Arrangement	Parties	Date

		(mm/yyyy)

Schedule D

Name: John Williams

Reporting Period: 2022

Part I: Positions Held Outside the FRB

Positions Held by You

Report any position held by you during the reporting period, whether compensated or not. A position includes but not limited to employee, officer, owner, director, trustee, partner, advisor 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.

Positions Held by Your Relatives

Also report any position held by your spouse or registered domestic partner, child, parent or sibling with a bank, credit union, savings and loan association, savings bank, trust company, bank holding company, thrift holding company, primary government securities dealer, an affiliate or subsidiary of any of the foregoing, a systemically important financial institution, a financial market utility, and any entity which, to your knowledge, does or seeks to do business with the Bank.

To remove an item, please click Remove below each line.

If you have no applicable positions held outside the FRB to report, simply check the box below. Do not write "none" or "N/A."

I have no applicable positions held outside the FRB to report:

Organization (Name and Address)	Holder	Type of Organization/ (If Other, specify)	Position	From/To (mm/yyyy)
Economic Club of New York (New York, NY)	Employee	Other Nonprofit	Board Member, Board Chair	06/2019 Present

Part II: Other Situations

Describe any other relationship or circumstances that you believe might constitute an actual or apparent conflict of interest or violation of law or Bank policy. Provide all relevant information.

If you have no other situations to report, simply check the box below. Do not write "none" or "N/A."

I have no other situations to report: Yes

Audit Trail

Name: John Williams

Reporting Period: 2022

Date of Activity	Type of Activity	Updated By	Report Status
05/15/2023 06:50:50 AM	Status Change	[REDACTED]	Submitted
05/15/2023 06:50:43 AM	Saved	[REDACTED]	Saved
05/15/2023 06:50:35 AM	Saved	[REDACTED]	Saved
05/15/2023 06:49:00 AM	Saved	[REDACTED]	Saved
05/15/2023 06:48:32 AM	Saved	[REDACTED]	Saved
05/15/2023 06:47:48 AM	Saved	[REDACTED]	Saved
05/15/2023 06:47:10 AM	Saved	[REDACTED]	Saved
05/15/2023 06:45:51 AM	Saved	[REDACTED]	Saved
05/11/2023 01:57:24 PM	Signed Off	[REDACTED]	Saved
05/11/2023 01:56:04 PM	Signed Off	[REDACTED]	Saved
05/11/2023 01:55:23 PM	Signed Off	[REDACTED]	Saved
05/03/2023 01:59:19 PM	Saved	[REDACTED]	Saved
05/01/2023 10:52:06 AM	Signed Off	[REDACTED]	Saved
04/25/2023 03:42:52 PM	Signed Off	[REDACTED]	Saved
03/22/2023 01:16:37 PM	Signed Off	[REDACTED]	Saved
03/20/2023 03:57:19 PM	Signed Off	[REDACTED]	Saved
03/20/2023 12:56:21 PM	Signed Off	[REDACTED]	Saved
03/20/2023 11:25:24 AM	Signed Off	[REDACTED]	Saved
03/20/2023 11:23:42 AM	Signed Off	[REDACTED]	Saved
03/14/2023 04:37:19 PM	Signed Off	[REDACTED]	Saved
03/14/2023 04:25:21 PM	Signed Off	[REDACTED]	Saved
03/14/2023 04:03:56 PM	Signed Off	[REDACTED]	Saved
03/14/2023 02:29:02 PM	Signed Off	[REDACTED]	Saved
03/14/2023 02:26:55 PM	Signed Off	[REDACTED]	Saved

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Date of Activity	Type of Activity	Updated By	Report Status
03/14/2023 01:59:59 PM	Signed Off	[REDACTED]	Saved
03/14/2023 01:47:42 PM	Signed Off	[REDACTED]	Saved
03/14/2023 01:45:38 PM	Signed Off	[REDACTED]	Saved
03/14/2023 01:22:57 PM	Signed Off	[REDACTED]	Saved
03/14/2023 01:06:59 PM	Signed Off	[REDACTED]	Saved
03/14/2023 12:45:00 PM	Signed Off	[REDACTED]	Saved
03/14/2023 12:36:20 PM	Signed Off	[REDACTED]	Saved
03/14/2023 09:55:00 AM	Signed Off	[REDACTED]	Saved
03/14/2023 09:39:29 AM	Signed Off	[REDACTED]	Saved

Definitions

Name: John Williams

Reporting Period: 2022

Savings and Loan Holding Companies

<https://www.newyorkfed.org/medialibrary/media/aboutthefed/SLHCList.pdf>

Dependent Child

The term "dependent child" means your son, daughter, stepson or stepdaughter if such person is either (1) unmarried, under age 21, and living in your household, or (2) is claimed as a dependent on your federal income tax return.

Registered domestic partner

Two adults, of the same or opposite sex, who have completed the Federal Reserve System Declaration of Domestic Partnership form.

Systemically Important Financial Institution

A nonbank company that has been designated by the Financial Services Oversight Committee as one that, if materially stressed, could pose a threat to financial stability in the US.

<https://www.newyorkfed.org/medialibrary/media/aboutthefed/fsoclist.pdf>

Designated Financial Market Utilities

Any person that manages or operates a multilateral system for the purpose of transferring, clearing, or settling payments, securities, or other financial transactions among financial institutions or between financial institutions and the person.

<https://www.newyorkfed.org/medialibrary/media/aboutthefed/fsoclist.pdf>

Exempt Liabilities

1. A mortgage loan the proceeds of which were used to finance your primary residence unless the loan was incurred within the last six months.
2. a credit card account provided payment on the indebtedness is current and
3. a student loan incurred prior to your employment at the Bank.