Select Committee on Ethics





	5 Senate Select Committee on Ethics
	Purpose of Financial
mili	Disclosure
	Public disclosure of a public officials' personal financial interest is often considered the key component to an effective code of conduct. The drafters of the original Senate Code of Official Conduct in the 95th Congress considered "full and complete disclosure" to be the heart of the Code of Conduct. Pursuant to Statute and Senate Rule, Members, officers, and certain employees of the Senate are required to file comprehensive annual public financial disclosure reports.

Select Committee on Ethics







Select Committee on Ethics







Select Committee on Ethics

Financial Disclosure





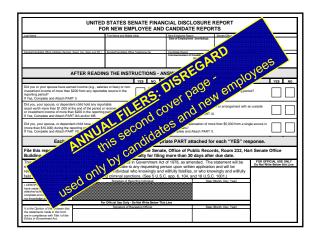


Select Committee on Ethics





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	UNITED STATES SE		NCIAL DISCLO MINATION REI		
Last Name	First Name and Middle Init		Annual Report	Senate Office / Agency in With	ich Employed
Filer	Joe		2009	Select Commi	ttee on Ethics
Sense Office Address (Number, Street, City, Store, and SH 220 Hart Washington, DC 20510	202-22	24-2981	Termination Report Termination Date (mm/r		
AFTER READING THE IN:	STRUCTIONS - ANSW		THESE QUESTI	ONS AND ATTACH THE	
		YES NO			YES NO
Did any individual or organization make a paying you for a speech, appearance, or a If Yes, Complete and Attach PART I.	donation to charity in lieu of rticle in the reporting period?	X		sependent child receive any reportab in the reporting period (i.e., worth me ch PART VI.	
Did you or your spouse have earned incon investment income of more than \$200 from reporting period? If Yes, Complete and Attach PART II.	n any reportable source in the	IXII II	id you, your spouse, or o an \$10,000) during the r Yes, Complete and Atta	sependent child have any reportable eporting period? ch PART VII.	liability (more
Did you, your spouse, or dependent child it more than \$1,000 at the end of the period, investment income of more than \$200 in the If Yes, Complete & Attach PART IIIA and/o	or receive unearned or se reporting period?		id you hold any reportab urrent calendar year? Yes, Complete and Atta	le positions on or before the date of I ch PART VIII.	lling in the
Did you, your spouse, or dependent child p reportable asset worth more than \$1,000 in If Yes, Complete and Attach PART IV.	ourchase, sell, or exchange any n the reporting period?	X	o you have any reportab stity? Yes, Complete and Atta	le agreement or arrangement with an ch PART IX.	outside X
Did you, your spouse, or dependent child in reporting period (i.e., aggregating more the exempt)? If Yes, Complete and Attach PART V.	eceive any reportable gilt in the an \$335 and not otherwise	1 Y 11 16	this is your FIRST Repo 5,000 from a single soun Yes, Complete and Atta	g: Did you receive compensation of se in the two prior years? ch PART X.	more than
	must be answered ar	nd the approp	riate PART atta	ched for each "YES" res	inonse.
File this report and any amendm Senate, Washington, DC 20510.	ents with the Secretary of \$200 Penalty for filing mo	the Senate, Off re than 30 days	ice of Public Recor after due date.	ds, Room 232, Hart Senate (Office Building, U.S.
This Financial Disclosure Statement is by the Office of the Secretary of the Si on Ethics. Any individual who knowing oriminal sanctions. (See 5 U.S.C. app.	enate to any requesting person gly and willfully falsifies, or who	upon written appl	cation and will be revi	ewed by the Select Committee	FOR OFFICIAL USE ONLY Do Not Write Below this Line
Certification	Signature of Rep	orting Individual		Date (Month, Day, Year)	I
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.	Jac 9			5/17/10	
	For Official Use Only - D		is Line		1
It is the Opinion of the reviewer that the statements made in this form are in compliance with Title I of the Ethics in Government Act.	Signature of Re	viewing Official		Date (Month, Day, Year)	



	NTIAL DISCLOSURE OF CANDIDATES HOME	
Filer	Joe	10/15/09
1234 2 nd and C Sneet Washington, DC 20510	100e Telephons Number (Include Area Code) 202-555-5555	
Office Making Address Number Street City State and 2P1 1235 2 nd and C Sneet Washington, DC 20510	Ofton Telephone Number (Include Area Code) 202-555-556	
year ain individual continues to be a candi- required to file a Candidate Report. Contents of Reports: List your home an and correct. Penalty Provisions: Any individual who be filed, or, if an extension is granted, mol fee. Walvers of this fee may be granted to this report may result in the imposition of a Review of Reports: These reports will b	er is later, but at least 30 days before the effection, and of classes. A candidate was currently holds an elected position of office address and phone number. Please sign your re is required to file this report and does so more than 30 day to the committee of the committee of the committee of your force of the committee of the committee of your force of the committee of the committee of the committee com	in in the United States Congress is not upont certifying that your report is complete says after the date the report is required to enough the subject to a \$200 penalty steed in writina. Falsifying or failing to file and 18 U.S.C. 1001.)
Certification	Signature of Reporting Individual	Date (Month, Day, Year)
I CERTIFY that the statements I have made on this form and all stached schedules are true.	Ioe Filer	5/17/10

	OE FILI	ER	PART I. PAYMENTS	TO PAY CHARI	TABLE ORGANIZATIONS I	N LIEU OF HONORAR	IA 1
during ti	he reporting	period. Identify	the activity (speech, article, o	or appearance), w	ch source to a charitable organi hich generated the payment. Fa ayments must be reported in Pa	or further information, see	
Date of	f Payment	N	ame of Source	А	ddress (City, State)	Speech, Article, or Appearance	Amount
Example	3260X	Association of Amer	can Associations	Wash, DC	EXAMPLE	Speech EXAMPLE	\$1,000
- Compre	7/23/0X	XYZ Megszine		NY, NY	EXAMPLE	Article EXAMPLE	\$500
1 6/1	0/09	Let's Go	Knicks, Inc.	Chicago,	Illinois	Speech	\$2000
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12			RE	MEME	3ER		
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14							
	A separate,	confidential report	which names the charitable orga	nization receiving su	ch payments must be filed directly	with the Select Committee or	Ethics.

Last Name		First Name and Middle Initia		Telephone Number (Include	Area Code)	
FILER		JOE		202-224-29	81	
		Calendar Year Covered by a	Annual Report		ployed (or formerly employed)	
X	ANNUAL FILER	2009			ETHICS COMP	
	TERMINATION FILER	Dates Covered by Terminat	on Report:	Office / Agency in which For	merly Employed	Termination Date (mm/dd/yy):
Staclosure Report i Stacs. Where to File: File toom 220, Hart Se	ris the instructions for the Senate Pub- or contact the U.S. Senate Select Corn in this report with the Select Corneline inste Office Building, U.S. Senate, Wa e note: This is not the filing location for	mittee on Contents of Repo unascertairable, it on Ethics, shington, the public which correspond bubble financial dis Piblus sign your correct, and that in	ness (city, state) of the na is (city, state) of the na the amount of the parts to the reporting period closure form filed in eport certifying that yo o payments were ma	giving rise to the payment), e source of the payment, the	criminal sanctions. (See 2 U.S Review of Reports: These rep Committee along with the corn days of the filing date. These	audit in the imposition of a cold and S.C. 701 at seq. and 18 U.S.C. 10 ports will be reviewed by the exponding public reports within 60 reports will be kept confidential by the Ethics in Government Act of 1
Date	Source of Payment	(Name, Address)	Recipient	Charitable Organia	zation (Name, Addres	ss) Amount
6/10/09	Lets Go Knicks,	Chicago, IL	America	Red Cross, W	ashington, DC	\$2,000
	This parti	cular page of the US Sen				
	Sertification statements / have made on		Signature of Re	porting Individual		Date (Month, Day, Year)

JOE FILER PA	ART II. EARNED AND NON-INVEST	MENT INCOME	2
Report the source (name and address), type, and amount for your gousse, report the source (name and address) a smouth needs to be specified for your produces. (Ress) a smouth needs to be specified for your spouse. 1.5. Government for you or your spouse. In the source of the source of the Honoraria Ban: For you and for your spouse, report honoraria income rec- speech, appearance or articol generating such honoraria	nd type of earned income which aggregate \$1,0 CONTENTS OF REPORTS Part B of Instruction erved which aggregates \$200 or more by exact a	00 or more during the reporting p s.) Do not report income from er amount, give the date of, and de-	period. No apployment by t
Name of Income Source	Address (City, State)	Type of Income	Amount
JP Computers	Wash, DC Example	Salary Example	\$15,000
MCI (Spouse)	Arlington, VA Example	Salary Example	Over \$1,000
DEWEY CHEATEM REELECTION CMTE	NEW YORK, NY	SALARY	\$18,000
I BELIEVE SO, INC. (SPOUSE)	JOE FILER	SALARY	OVER \$1,0
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В			
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If "Over \$1,000	"is indicated for the AM	OUNT places	
be sure to if	ndicate that it is from you	i Spouse	
2			

Reporting Individual's Name JOE FILER	P	AR'	T II	IA.	. F	PU	BL	IC	LY	TF	RA	DE	D.	AS	SE	TS	S A	NE) U	NE	ARNI	ΕD	IN	CC	M	E S	50	UR	CI	s		24	3
BLOCK A Identity of Publicly Traded Assets And Unearned Income Sources Report the complete name of each publicly traded asset held by you, your spouse, or			At	the f No	uat dos	e of s	of a	Ass ting in \$1	,001	od.			L	н		_		dude	is in	21)" i	ype and s Checker neceived	d A	mo	ir en	of I	nee bene	efit o	in B	indi	vidu	at.	t iter	n. This
your dependent child, (Dée, p.3, CONTENTS OF REPORTS Part of or Instructions) for production of income or 11 has a state of the content of each public bond, mutual fund, publicly traded parinership interest, excepted wire duration funds, bank accounts, excepted and qualified billing accounts, excepted and qualified billing the content of the content	None (or less than \$1,001)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 -\$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 -\$50,000,000	Over \$50,000,000	None	Dividends	Plant	Interest.	Capital Gains	Excepted Investment Fund	Excepted Trust	Qualified Blind Trust	Other (Spacify Type)	None (or lass than \$201)	\$201 -\$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	Over \$5,000,000	Actua Amou Requir if "Othe Specifi
S. IBM Corp. (stock)	L			х										x							Example	Ш	×						ш				Dany
or J (S) Keystone Fund	₽	L	L	L	х		Ц	_	Н	L	L	L	L	L	L	L	L	х	L	L	Example	х	L	L	L	L	L	L	L	L	⊢	L	Dany
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2	L	L	L	L	L	L	Ц		L	L	L	L	L	L	L	L	L	L	L	L		L	L	L	L	L	L	L	L	L	L	L	
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Select Committee on Ethics

Financial Disclosure





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PART II	A.
MINISTER !	
PUBLICLY TRADED STO	OCKS & BONDS
 Identify by complete name, and exchange upon which it's liste 	d preferably the
exolidings upon which it shots	
■ MUTUAL FUNDS	
> Identify by complete name,	
including name of investment institution offering the fund (Templeton, Vangard, etc.)	
(Templeton, Vangard, etc.) > and the specific identification	MAI STREET
of the fund (Total Return,	MIL SIL
Equity, etc.).	News
MUNICIPAL BONDS	
Identify by name of municipalithe bond and complete name of	ty offering of the bond

Select Committee on Ethics

Financial Disclosure





mi	US Samte Select Committee on Ethics
Merry	PART IIIA.
THE STATE	INVESTMENT CLUBS
min	OR OTHER
TITLE	HOLDING ARRANGEMENTS
Manse	Identify the investment club and also any underlying investment asset or property held by the club where
	(i) you (your spouse or dependent child's) interest in the underlying asset exceeds \$1,000 in value or
	(ii) where the underlying asset generated more than \$200 in income for you (your spouse or dependent child)
157	(iii) if the investment club or holding itself meets the definition of an excepted investment fund, the information regarding the underlying assets are not
1	reportable

Select Committee on Ethics

Financial Disclosure

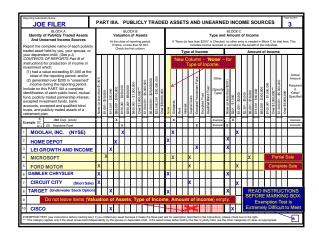
MIL 3	35 Senate Select Committee on Bibles
Anni	PART IIIA.
100111	RETIREMENT PLANS
	Identify each asset held by a self-directed retirement plan.
	A self-directed retirement plan is one which does not meet the definition of an excepted investment fund.
	Widely held (i.e. has more than 100 participants or investors); and
6	Publicly traded (or available) or widely- diversified; and
	Held under circumstances where you don't have control over the financial interests held by the fund.





Select Committee on Ethics

Financial Disclosure



TEST The reporting individual is not required to report assets, transactions, and/or liabilities which the reporting individual certifies: (1) represents the spouse's or dependent child's sole financial interest or responsibility and which the reporting individual has no knowledge of; (2) which are not in any way, past or present, derived from the income, assets, or activities of the reporting individual; and (3) which the reporting individual neither derives, nor expects to derive, any financial or economic benefit.

Recorting Individual's Name												=	=	=													=	=	=	=	=	=	_
JOE FILER	F	AF	ŧΤΙ	IIB	. 1	101	N-P	UE	LI	CL.	ΥT	'R/	۱DI	ED	AS	SE	TS	A	ND	٩U	NEAR	١E	AII C	(C)	МС	E	30	UR	CE	s		ľ	4
BLOCK A Identity of Non-Publicly Traded Assets and Unearned Income Sources Report the name, address (city, state and				a the	clos	e of s	of a	Ass rting	perio				I	11.	None	ı (or	less inc	than lude	\$20 s inc	nr is	ype an s Checke received	d A	athe	int	of I	nes	nded	in B	lock indi	C fo	r the	t iter	m. This
description) of each interest held by you,	П			C	heck	the	first o	colur	in.				г	_	-	Гур	e of	Inc	com	ie		г				Алп	ou	nt o	f In	con	ne	_	_
your spouse, or your dependent child (Set p.3, CONTENTS OF REPORTS Part B of Instructions) for the production of income or investment in a non-public trade or	Ī		Ī											N	lew	C	olu yp	mr e o	ı - f İr	'N CO	one' - me.	fo	r										
business which: (1) had a value exceeding \$1,000 at the close of the reporting period; and/or (2) generated over \$200 in vincemed; income during the reporting period, include the above report for each underlying asset, which is not incidental to the trade or business. Publicly traded assets held by non-public entity may be litered in Part 1.	Money for base then \$4 (004)	\$1.001.815.000	\$15,001 - \$50,000	\$50.001 - \$100.000		\$250,001 - \$500,000	\$500,001-\$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	\$5,000,0001 - \$25,000,000	\$25,000,001 -\$50,000,000	Over \$50,000,000	None	Dividends	Bark	Interest	Capital Gains	Excepted Investment Fund	Excepted Trust	Qualified Bind Trust	Other (Specify Type)	None (or less than \$201)	\$201 -\$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	Over \$5,000,000	Actual Amount Required if "Other" Specified
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Select Committee on Ethics - Jinancial Disclosure

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eporting period of a other securities whe include transactions involving property us setween you, your s	Constant and statute or consta	stocks, bonds, commodity futures, and be transaction exceeded \$1,000. loss. Do not report a transaction personal residence, or a transaction jent child. Please clarify which two oble exchange.	Purchase	Sale	Exchange	Transaction Date (Mo., Day, Yr.)	\$1,001 - \$15,000	\$15,001 - \$50,000	850,001 - \$100,000	\$100,001 - \$250,000	5250,001 - \$500,000	5500,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	55,000,001 - \$25,000,000	25,000,001 - \$50,000,000	One 650,000,000
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JOE FILER		PART V. GIFTS	6
.3 CONTENTS OF REPORTS Par are shold. "Gift" is defined in the Instance. Exclude: (1) Bequests and other for every appers and periodicals; (4) Co y persons other than yourself; (5) of er relationship to you; (7) Gifts from	t B of Instructions), from each source. Gatructions. orms of inheritance; (2) Political campaignsumable products provided by home stadils received prior to your Federal emplor relatives; (8) Personal hospitatity of any digning; and (10) Food, lodging; amapport	uan \$335 in value received by you, your spouse, or your depended that with a value of \$134 or less need not be aggregated towards yo contributions; (3) Communications to your offices including subtle to businesses to your offices, if those products are intended for your offices, if those products are intended for your, offices your offices, if those products are intended for your, offices, if the your spouse or dependent child totally independently i	escriptions to consumption ndent of his insumed in
Name of Income Source	Address of Source	Dates and Brief Description	Gift Valu
xample: Mr. John Q. Smith	Anytown, VA Example	August 12, 200X, Silver platter - Ethics Committee waiver granted	\$400
CHARLES GENEROUS	WASHINGTON, DC	July 9, 2009 – Marble Statue	\$ 500
		(Ethics Committee Waiver Granted)	
		norize their acceptance which ation of Senate Rule 35	
JOHN GERTZ	(?) K	July 8, 2009 – Marble Statue – waiver granted	\$ 500
DAVE WALTER	NAPLES, FL	Royal Palm Tree – waiver granted (? – Date)	\$ 300
	Include the Ad	dress of Source	
		te in the Dates and Brief Description	

	15 Samta Salasi Com	nilities on Bibles
finnin	NO GIFTS LOBBY	
	Members, officers, and employees of the Senate may no longer accept any gift from a registered lobbyist or foreign agent, or an entity that employs or retains the same, unless a specific exception to the Gifts Rule applies.	

Select Committee on Ethics

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MATSURE IN MORE MADE IN MATSURE ADVANCED TRAVEL MATSURE ADVANCE TRAVEL AUTHORIZATION AND DISCLOSURE FORM	RE - 1 / 2
☐ Amendment (if checked, no sign and date point to filing) FART 1: Complete this motion is advance of turnel:	Travel Form
Same Fractional Joe Filer The designment by the discussion Factifinders, Inc. The design March 15 – 17, 2009 Teamson, Naules, Florida	■ All Staffers fill out RE 1 / 2. ■ Forms should be filed with
topics why perception in temp is assessed to your official decide Speaking Engagem	OPR within 30 days after completion of travel.
State of an amounts in the manufact prop Joan Filler Residently to Reprise 8 thereof the Child Land State Information assessment in the last interest to the best of any humbles 3/12/09 Jac Filer Land State L	■ Make sure all signatures
TO BE COMPLETED BY SUPERVISING MEMBER:	Available on-line
Z. Senator (Senator's (Senator) senator) (Senator)	
he or the issuing public office for privace gam. Have such desiration of the fine for the major year's game or chief in aggregation to make in the agreementation of the finence. Or (rigard) "year" by whealthy has? 3/12/09 Z. Security (Security Theorem of Security Theorem of Securit	Travel reported more than 30 days after completion of travel should be reported on Part VI – Reimbursements of your Public Financial Disclosure Form.
Continued	Public Financial Disclosure Form.

the Office of Publishers will be compliance will bene been or will FILL IN THE AP	to Records in Room in Rule 31.2 (c) and he paid for me, as: PROPRIATE LINE	212 of the Hart Bo (i), I make the fell set out above: II AND DICLUDE	initing lowing disclosures to ANY EXPENSES	h yages of the completed for tith respect to travel expense EEDABURSED OR PAJD F L. (Albah additional yages)	OR AN	RE - 1 / 2 Travel Form
	Transportation Expenses	Lodging Expenses	Med Expenses	Other Expenses (Amount & Description	ine)	
S Good Faith optionate C Actual	\$ 625	\$ 275	\$ 150			■ All Staffers fill out RE 1 / 2.
Amount Provide a descript seconary):	ton of all meetings	and crossis attende	i. See Setuite Rule	M 29/(M). (Attach additions	d pages if	Proms should be filed with OPR within 30 days after completion of travel.
8/12			Jo	e Filer		Make sure all signatures and dates are filled in before form is turned in to OPR.
WITH TRAVEL		ART I, ARE NICE		IN PART 2 IN CONNECTS REATION, LODGENG, AN		Available on-line
8/14/08				. Senator		
be the trip sponso		ided to the Office o		r Tornel Certification Form c own 252 of the Hart Buildin		Travel reported more than 30 days after completion of travel should be reported on Part VI – Reimbursements of your Public Financial Disclosure Form.
we-100007					Fee: 85-12	

SENATORS AND OFFICERS: STORY OF THE PROPERTY O	RE - 3
2. Amendment or research, resign and eace power to many. This disclosure, along with a copy of the Prints Hypmone Troud Cartification From completed by the trip specure(s), MHST to previous to the Office of Public Househ, House 150 of the Hard building, within thiny (45) days often the travel of control of the Hard building, within thiny.	Travel Form
The completion with Nat in 15 (a) and (a) 1 T. S. Senator with a fishering distance with squares to the open and before him well in combinating of the sec which the first gradients with squares to the open and before him well in combinating of the sec finance amounts produced and the combination of the combinatio	 ■ Only Members & Officers fill out RE – 3. ■ Forms should be filed with OPR within 30 days after completion of travel. ■ Make sure all signatures and dates are filled in before form is turned in to OPR.
Provide a description of all mannings and events attended. See Securit Rule 35.5(s; x/s), (Attach additional pages fluoromery). Speaking Engagement	Available on-line
Labora Marcia de ARRESEMENTOS NELS TRES ENERSES. ESCARBIS ARROS NELS ACCONSTRUCTOR WITH REPORT AND ACCONSTRUCTOR. AND SON DISTORDANCE STATES NELS STRUCTURES OF TRES ACCONSTRUCTOR. AND SON DISTORDANCE STATES NELS STRUCTURES OF TRES ACCONSTRUCTOR STATES ACCONSTRUCTOR STATES ACCONSTRUCTOR STATES ACCOUNTY OF THE ACCOUNTY	Travel reported more than 30 days after completion of travel should be reported on Part VI – Reimbursements of your Public Financial Disclosure Form.

					_					
	IOE FILER		ART VI. REIMBURSEMENTS	7						
Report nocessary travel related expenses from each source aggregating more than SSS in value during the reporting period received by you, your good and/or depended rold this connection with your provision of sensiones at a speaking responser. (Ear-triding even of other event (personal campage), or otherwise). This closure is required regarded or otherwise required regarded to the distriction of the rest (personal campage), or otherwise). This closure is required the regarded received by the gonomorphy of the provision of the regarded regarded and the regarded regarded received by the gonomorphy of the regarded regarded received by the gonomorphy of the regarded regarded received by the gonomorphy of the regarded received by the gonomorphy of the regarded regarded received by the gonomorphy of the regarded received by the gonomorphy of the regarded received by the regarded received by the regarded received received by the regarded received rece										
	Name of Income Source	Address	of Source	Dates and Brief Description						
Example:	All States Company	Maintown, TX	EXAMPLE	Roundtrip air travel from Washington, D.C. to Maintown, TX and lunch for self and for speaking engagement: May 1-3, 200X EXAMPLE	f spouse					
1										
² Fa	ctfinders, Inc.	Orlando,	FL	Roundtrip air and lodging, and meals from Wash, DC to Naples, FL for Speaking Engagement, March 15 – 17, 2009						
3										
4										
5 6 7		Rule 35 (within 3	55 forms (RE – 1 / 2, RE – 3) 30 days of travel) does not have closed again						
8										
10 Ru	ussell Company	(.	?) ĸ	Roundtrip air from DC to San Diego, CA, lodging and meals (?)					
11		,	, ,		•					
12					_					
13				Address of Source						

Ri	JOE	FILER		PART VII.	LIAB	ILITIE	s									Pag	8	
г	•					_	T	Category of Amount of Value ()							(x)	=		
Report liabilities over \$10,000 need by you, your spous OONTENIS OF REPORTS Fat Be of Instructions), as a during the reporting period. Check the highest amount period. Exclude: (1) Mortgages on your personal reside secured by automobiles, household furniture or applian certain relatives listed in Instructions. See Instructions for accounts.		o any one creditor at any time int owed during the reporting idences unless rented; (2) loans ances; and (3) liabilities owed to		Date Incurred Interest Rate	Interest Rate	Term if Applicable	01 - \$15,000	\$15,001 - \$50,000	001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	8500,001 - \$1,000,000	\$1,000,000***	81,000,001 - \$5,000,000	55,000,001 - \$25,000,000	525,000,001 - \$50,000,000	Over \$50,000,000	
L	Name o	of Creditor	Address	Type of Liability				\$10,001	\$15,	\$50,001	\$100	\$250	8	9/0	\$1,0	0'98	\$25	Over
г	S, Example: DC.	First District Bank	Wash., DC	Mortgage on undeveloped land	1991	13%	25yrs			Х		Ε	Х	Α	М	Ρ	L	Ε
L	Example: DC, or J	(J) John Jones	Wash, DC	Promissory Note	1999	10%	On dmd				х	Е	х	А	м	Р	L	Ε
1	LEG BRE	AKER BANK	NY, NY	UNSECURED LOAN	2009	100%	on dmd		х								П	П
2																	П	П
3									Г		Г		Г				П	П
4																	П	П
5																	П	П
6																	П	П
7	First US	Bank	Baltimore, MD	Unsecured Loan	2007	(?)	(?)			x							П	
8						7											П	
9	9																	
10			Don	ot leave items (Interest	Rate	Tern	n if A	ppl	ica	ble	e) e	mp	oty.					
11	11																Ш	Ш
12	12																	
£X	DEXEMPTION TEST (less instructions before marking loss) if you oritised any asset because it meats the three-part less for exemption described in the instructions, please check bon to the right. "This cologyry applies only if the asset lavines held independently by the spoose or dependent child. If the asset lavines after held by the filter or jointly half, one the other cologories of vision, as appropriate.																	

offi ent	cer, director, trustee, general partne terprise or any non-profit organization. Id.	ig the applicable reporting period wher, proprietor, representative, employon or educational institution. Both the	yee, or consultant of any corpo e year and month must be repo	ration, firm, partnership, or orted for the period of time	r other busine that the posi	ess
	Name of Organization	Address (City, State)	Type of Organization	Position Held	From (Mo/Yr)	To (Mo/Y
	National Assn. of Rock Collectors	NY,NY EXAMPLE	Non-profit education	President	6/90	Present
-41	Jones & Smith	Hometown, USA EXAMPLE	Law Firm	Partner	7/95	11/0X
1	DEWEY, CHEATUM & HOWE	NEW YORK, NY	Non-Profit Education	DIRECTOR	5/07	Preser
3	GOOD SAMARITIAN CHARITY	WASHINGTON, DC	CHARITY	BOARD MEMBER	1/08	2/09
4					1	
3						
7						
0		nat compensation orted on Part II (Ea				
2						
3			1	ĺ	1	ı

JOI	E FILER	PART IX. AGREEMENTS O	RARRANGEMENTS		10
of	other intellectual property	arrangements for future employment (including agreem r), leaves of absence, continuation of payment by a forn n an employee benefit plan. See Instructions regarding	ner employer (including sev	erance paymi	ents),
	Status and Term	ns of any Agreement or Arrangement	Parties		Date
	share calculated on services pe independently managed, fully fu		Jones & Smith, Hometown, USA	Example	1/93
. zanpu	Employment agreement with X's agreement include salary betwee options	Z Co. to become Vice President of Government Relations. Terms of en \$50,001-\$100,000, signing bonus between \$2,501-\$5,000 and stock	XYZ Co., Bethesde, MD	Example	1/0X
		Agreement, will remain in Partnership	DEWEY, CHEATUM &	HOWE	1/09
4011	K Plan (No further o	ontributions to Plan from Partnership or Self)			
5					
3					
,					
3					
0					
1					
2					
					-
3					

FIRST TIME FILERS ONLY:										
Regist assured of corporation received by you or your business difficient for enrices provided detailly by you dring the reporting period. This includes the names of clients and customers of any corporation, film, partnership, or other business enterprise, or any my corporation period in partnership or discrepancy and period or provided the provided by provided the services to the clients and/or customers of the firm that generated a fee or payment of more than \$5.000. You need not report the U.S. Overwritten as a source of the firm that generated a fee or payment of more than \$5.000. You need not report the U.S.										
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	MPLE EXAMPLE									
uction	EXAMPLE									
an mousting	matter									
	on when you out report the U									

IF YOU HAVE ANY	
QUESTIONS, PLEASE	
CALL	
The Senate Select Committee on Ethics	
224-2981 (main) 224-7416 (fax)	
mailbox_office@ethics.senate.gov (email)	
All Advice is Confidential	