|     | hild No No   | Have you excluded from this report any other assets, "uneamed" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics | sets, "uneamed" inc<br>? Do not answer "yea    | Exemptions Have you excluded from this report any other as because they meet all three tests for exemption   |                |
|-----|--|--|--|--|----------------|
|     | Yes No 🗸   | Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be<br>disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?             | wed by the Committe<br>details of such a trust | Trusts- Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain disclosed. Have you excluded from this report details of such a trust benefiting you, your sp   |                |
|     | STIONS   | ATION ANSWER EACH OF THESE QUE   | JST INFORMA                                    | EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION ANSWER EACH OF THESE QUESTIONS  | EX             |
|     |  | schedule attached for each "Yes" response.   |  | If yes, complete and attach Schedule V.  |                |
|     | and the appropriate                                | Each question in this part must be answered and the appropriate  | Yes No   | Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?   | <              |
|     |  | If yes, complete and attach Schedule IX.   |  | if yes, complete and attach Schedule IV.   |                |
|     | outside Yes No 🗸                                   | Did you have any reportable agreement or arrangement with an outside IX. entity?   | Yes € No [                                     | Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period?  | ₹              |
|     |  | If yes, complete and attach Schedule VIII.   |  | If yes, complete and attach Schedule III.  |                |
|     | ling in the Yes V No                               | Did you hold any reportable positions on or before the date of filing in the Vill. current calendar year?  | Yes No   | Did you, your spouse, or a dependent child receive "unearned" income of more than \$200 in the reporting period or hold any reportable asset worth more than \$100 in the report the nest of | #              |
|     |  | If yes, complete and attach Schedule VII.  |  | If yes, complete and attach Schedule II.   |                |
|     | ble travel or han \$350 Yes ☐ No 🗸                 | Did you, your spouse, or a dependent child receive any reportable travel or VII. reimbursements for travel in the reporting period (worth more than \$350 from one source)?  | Yes No   | Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article in the reporting period?  | .=             |
|     |  | If yes, complete and attach Schedule VI.   |  | If yes, complete and attach Schedule I.  |                |
|     | therwise Yes No                                    | Did you, your spouse, or a dependent child receive any reportable gift in VI. the reporting period (i.e., aggregating more than \$350 and not otherwise exempt)?   | Yes   No V                                     | Did you or your spouse have "eamed" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period?  | ; <del>-</del> |
|     |  | UESTIONS   | OF THESE QUESTIONS                             | PRELIMINARY INFORMATION ANSWER EACH  | 밁              |
|     | late.  | ion  | ☐ Termination                                  | Type Annual (May 15)   Amendment   |                |
|     | more than 30 days                                  | Termination Date:  |  | Report   | رح             |
| •   | be assessed against                                | Employee   | ſΤ   | Status House of Representatives District: 12   | S.             |
| YES | U.S. HOUSE OF REPRESENTATIVE A \$200 penalty shall | Officer Or Employing Office:   | 0 0  | Filer Member of the U.S. State: MI   |                |
| 3   | (Office Use Poly).                                 | (Daytime Telephone)  |  | (Full Name)  |                |
| -   | 2012 MAY 15 PH 2: 04                               | 202-225-4961   |  | Sander M. Levin  |                |
| Ħ.  | LEGISI ATIVE RESOURCE CLNITE                       |  |  |  |                |
|     | DELIVERED  | FORM A Page 1 of 7 For use by Members, officers, and employees   | TATIVES  | UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2011 FINANCIAL DISCLOSURE STATEMENT   | ⊊              |
|     | IANI   |  |  |  | 7              |

| SCHEDULE      |  |
|---------------|--|
| EIII - ASSETS |  |
| AND "UNEA     |  |
| RNED" INCOME  |  |
| ME            |  |
| Sander V      |  |

If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC), or is jointly held with your spouse (JT), in the optional column on the far left \$5,000 or less in a personal checking or saving accounts; and any financial interest in, or income derived from, a federal retirement program, including the Thrift (unless there was rental income during the reporting period); any deposits totaling state the name of the business, the nature of its activities, and its geographic investments), provide the value for each asset held in the account that exceeds the value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or sources of income which generated more than \$200 in Exclude: Your personal residence, including second homes and vacation homes location in Block A. For an ownership interest in a privately-held business that is not publically traded, For rental or other real property held for investment, provide a complete address. reporting period. only the name of the institution holding the account and its value at the end of the reporting thresholds. For retirement accounts which are not self-directed, provide (i.e., plans in which you have the power, even if not exercised, to select the specific For all IRAs and other retirement plans (such as 401(k) plans) that are self-directed Provide complete names of stocks and mutual funds (do not use ticker symbols.) identify (a) each asset held for investment or production of income with a fair market "unearned" income during the year. Asset and/or Income Source West Maple, Birmingham, 1/9 undivided interested in 1/9 undivided interest in 1/6 interest in 18 acres, Tyrone Township, Michigan Michigan West Maple, Birmingham, Levinson-Levin Properties Township, Michigan ..L.C., commercial real estate \_evinson-Levin Properties, 1/2 interest in 78 acres, Tyrone .L.C., commercial real estate, BLOCK A \$139,235 \$73,662 \$18,866 \$209,000 specify the method used value should be "None." generated income, the market value, please method other than fair If you use a valuation included only because it is At close of reporting year. Value of Asset f an asset was sold and is Year-End INGILIE **BLOCK B** Sander M. Levin RENT RENT Z > column. Dividends, interest, and capital gains, even if during the reporting period. the asset generated no income as income. Check "None" if reinvested, must be disclosed do not allow you to choose Check all columns that apply you may check the "None" (such as 401(k) plans or IRAs) generate tax-deferred income specific investments or that For retirement accounts that Type of Income BLOCKC NONE NONE \$5,001 - \$15,000 \$5,001 - \$15,000 or generated. disclosed as income. Check gains, even if reinvested, must be Dividends, interest, and capital appropriate box below. income by checking the assets, indicate the category of deferred income (such as 401(k) not allow you to choose specific For retirement accounts that do "None" if no income was earned "None" column. For all other plans or iRAs), you may check the investments or that generate tax-Amount of Income BLOCK D reporting year. exceeding \$1,000 in exchanges (E) sales (S), or had purchases (P), Indicate if asset Transaction BLOCK E Page 2 of 7

| SCHEDUL | SCHEDULE III - ASSETS AND "UNEARNED" INCOME  | Name Sander M. Levin   | М. Levin               |            | Page 3 of 7 |
|---------|--|------------------------|------------------------|------------|-------------|
|         | 5.3% interest in LRS Co., a general partnership owning real estate in Romulus and Pontiac Townships, Michigan and        | \$1,001 -<br>\$15,000  | N/A                    | NONE       |             |
|         | 5.3% interest in Michigan mineral rights previously held by LNS Co., a general partnership now liquidated (see attached) | \$15,001 -<br>\$50,000 | Royalties              | \$4,671    |             |
|         | Congressional Federal Credit Union   | \$65,593               | INTEREST               | \$646      |             |
|         | House, Lot 4, West Tisbury, Mass. (Subject to GMAC Mortgage)   | \$1,123,100            | RENT                   | \$18,071   |             |
|         | IRRA: American Bond Fund of America CL C   | \$21,170.75            | Other: Tax<br>Deferred | NONE       |             |
|         | IRRA: American Capital Income Builder CL C   | \$30,879.75            | Other: Tax<br>Deferred | NONE       |             |
|         | IRRA: American Income Fund of America CL C   | \$45,550.40            | Other: Tax<br>Deferred | NONE       | S(part)     |
|         | Martha's Vineyard Cooperative Bank   | \$2,081.55             | INTEREST               | \$1.11     |             |
|         | The Victoria S. Levin Special Legacy Trust: American Capital Income Builder CL C   | \$113,866              | DIVIDENDS              | \$3,787.01 | ס           |
|         | The Victoria S. Levin Special Legacy Trust: American Bond Fund of America CL C   | \$118,421.80           | DIVIDENDS              | \$2,810.13 | ס           |
|         | The Victoria S. Levin Special Legacy Trust: American Income Fund of America CL   | \$115,934.40           | DIVIDENDS              | \$3,858.82 | ס           |

## SCHEDULE III - ASSETS AND "UNEARNED" INCOME

## **ATTACHMENT:**

5.3% interest in Michigan mineral rights previously held by LNS Co., a general partnership now liquidated: Muskegon Development Co., an assignee from previous lease - income - \$79; Breitburn Operating LP - income - \$1,116; Merit Energy Co -income - \$37; Linn Operating Inc. - income - \$3,439. The year-end value of these interests are estimated herein based on latest available information and technical advice.

| SCHEDULE III - ASSETS AND "UNEARNED" INCOME Nai                                 | Name Sander M. Levin |         | Page 4 of 7 |
|---|----------------------|---------|-------------|
| The Victoria S. Levin Special \$10,544.14 Legacy Trust: ML Bank Deposit Program | IA.14 INTEREST       | \$20.26 |             |

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## **SCHEDULE IV - TRANSACTIONS**

Name Sander M. Levin

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transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below. Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange

| SP,<br>DC, | Asset  | Type of<br>Transaction | Capital Gain in Excess of \$200? | Date     | Amount of Transaction |
|------------|--|------------------------|----------------------------------|----------|-----------------------|
|            | IRRA: American Income Fund of America CL S(part)                                 | S(part)                | No                               | 10-24-11 | \$5,500               |
|            | The Victoria S. Levin Special Legacy Trust: American Bond Fund of America CL C   | ס                      | NA                               | 01-21-11 | \$112,000             |
|            | The Victoria S. Levin Special Legacy Trust: American Capital Income Builder CL C | P                      | N/A                              | 01-21-11 | \$111,999.99          |
|            | The Victoria S. Levin Special Legacy Trust: American Income Fund of America CL   | Р                      | N/A                              | 01-21-11 | \$111,999.99          |

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| ABILITIES |

Name Sander M. Levin

Page 6 of 7

amount owed during the year. Exclude: Any mortgage on your personal residence (unless all or part of it is rented out); loans secured by automobiles, household furniture, or appliances; and liabilities owed to a spouse, or the child, parent, or sibling of you or your spouse. Report "revolving charge accounts" (i.e., credit cards) only if the balance at the close of the preceding calendar year exceeded \$10,000. NOTE: Pending legislation may require Members to report mortgates on Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or dependent child. Mark the highest personal residences.

|                               | SP,<br>DC,<br>JT              |
|-------------------------------|-------------------------------|
| GMAC Mortgage                 | Creditor                      |
| December<br>2010              | Date<br>Liability<br>Incurred |
| Mortgage, West Tisbury, Mass. | Type of Liability             |
| \$409,056                     | Amount of Liability           |

## **SCHEDULE VIII - POSITIONS**

Report all positions, compensated or uncompensated, held during the current calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or any business enterprise, any nonprofit organization, any labor organization, or any educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities; positions solely of an honorary nature; and positions listed on Schedule I.

Name Sander M. Levin

Page 7 of 7

| Position | Name of Organization              |
|----------|-----------------------------------|
| Partner  | LRS Company                       |
| Member   | Levinson-Levin Properties, L.L.C. |