



Filing ID #10001910

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Mr. Hakeem S. Jeffries
Status: Member
State/District: NY08

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2013
Filing Date: 05/15/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Savings Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Baybridge Federal Credit Union Account	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
CBS 401(k) ⇒ BlackRock Life Path 2020 Fund		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
CBS 401(k)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
CBS 401(k) ⇒ DFA Small Cap Portfolio		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Diversified IRA TAP Money Market Account	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Lutheran Medical Center 401(k) ⇒ JHancock3 Disciplined Value 1		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Lutheran Medical Center 401(k)	SP	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Lutheran Medical Center 401(k) ⇒		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
PIMCO Ret. Instl					
Lutheran Medical Center 401(k) ⇒ VALIC Fixed Interest		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
New York State Pension		\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual Whole Life Insurance Policy		\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual Whole Life Insurance Policy	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Russell Lifepoint Balanced Strategy Fund Class C	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>

* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Godosky and Gentile, New York, NY	Contingency fee/Case settlements	\$12,934.69
Northwestern Mutual Life Insurance Company	Surrender of a whole life insurance policy	\$6,905.14
1199 SEIU Benefits Fund	Spouse salary	N/A
Worksite Medical Service PC	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	HSBC	January 2007	Primary Residence Mortgage	\$250,001 - \$500,000
	Bank of America	April 2007	Home Equity Line of Credit	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2012	Godosky and Gentile/Hakeem S. Jeffries	Termination of Of Counsel Agreement with the firm and cessation of bi-weekly compensation. The departure agreement preserves a previously earned contingency fee interest in ten enumerated litigation matters to the extent any case is resolved favorably in the future, absent further legal involvement from Mr. Jeffries.
January 2013	Roman and Associates, PLLC/Hakeem S. Jeffries	Termination of Of Counsel agreement with the firm effective Jan. 2, 2013. The departure agreement preserves a previously earned contingency fee interest in one enumerated litigation matter to the extent this case is resolved favorably in the future, absent further legal involvement from Mr. Jeffries.
January 2007	New York State Common Retirement Fund/Hakeem S. Jeffries	Continued participation in a New York State pension plan.
January 2004	CBS/Hakeem S. Jeffries	Continued participation in a 401(k) plan.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- CBS 401(k)
- Lutheran Medical Center 401(k)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

COMMENTS

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Mr. Hakeem S. Jeffries , 05/15/2014