## **BLOCK A**

Asset and/or Income Source

the end of the reporting period, and (b) any other reportable asset or sources of income which generated identify (a) each asset held for investment or production of income with a fair market value exceeding \$1,000 at more than \$200 in "unearned" income during the year.

do not use ticker symbols). Provide complete names of stocks and mutual funds

have the power, even if not exercised, to select the spe-cific investments), provide the value for each asset held in the account that exceeds the reporting thresholds. For retirement accounts which are not self-directed, plans) that are self-directed (i.e., plans in which you For all IRAs and other retirement plans (such as 401(k) account and its value at the end of the reporting period. provide only the name of the institution holding the

provide a complete address. For rental or other real property held for investment,

>

ဂ

•

m

G

太

•

For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic ocation in Block A.

48

ing \$5,000 or less in personal checking or savings the Thrift Savings Plan. derived from, a federal retirement program, including accounts; and any financial interest in, or income ncome during the reporting period); any deposits totalnomes and vacation homes (unless there was renta Exclude: Your personal residence, including second

the optional column on the far left. income source is that of your spouse (SP) or dependent child (DC) or is jointly held with your spouse (JT), in f you so choose, you may indicate that an asset or None

\$1 - \$1,000

\$1,000,001

\$25,000,001

NONE

×

\$1,001 - \$15,000

\$50,001 - \$100,000

\$500,000

\$5,000,000

- \$50,000,000

please refer to the instruction booklet For a detailed discussion of Schedule III requirements,

ş

Ŷ

Examples:

Simon & Schuster Mega Corp. Stock

Indefinite

1st Bank of Paducah, KY accounts

イジス

TRA

IT USAA INVESTMENTS ANDWAY

FIDELITY INVESTMENTS IRA

DELTA EMPLOYERS C. U. CHECKER

SAOUP6

USAA BANK C.D.

## Value of Asset BLOCK B

valuation method other than fair of reporting year. If you use a method used. market value, please specify the Indicate value of asset at close

only because it generated reporting year and is included If an asset was sold during the "None." ncome, the value should be

BLOCK C

Type of Income

est, and capital gains, even if reinvested, must be disclosed as income. Check "None" if the allow you to choose specific Check all columns that apply. For retirement accounts that do not the reporting period. asset generated no income during deferred income (such as 401(k) plans or IRAs), you may check the investments or that generate tax-'None" column. **Dividends, inter-**

For retirement 2013 MAY that do Ph. 2040 ou LEGISLATIVE RESOURCE CENTER

ate tax-deferred internation his detailers or IRAs), you said the control of IRAs), you said the control of the gains, even if reinvested, must be disbelow. Dividends, interest, and capital to choose specific investments or that generclosed as income. Check "None" if no income by checking the appropriate box For all other assets, indicate the category of income was earned or generated.

Sec. 33				200				1		
						X			RENT	
	4. 350	1.4	a- 10		100 A	350				\$ 14.
									CAPITAL GAINS	
					ZX : 30					- A
							Royalties		Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	
				5,5		200				
									\$1 - \$200 =	
			Section 1	\$ 55	3.0%					_
					$L^{-}$		1	×	\$1,001 - \$2,500 <	Ĕ
						7				쿫
					<u></u>				- \$5,001 <b>-</b> \$15,000 ≤	Current Year
		100		1.60				*		⋨
		[			L				\$50,001 – \$100,000 <u>≦</u>	5
21.20	400									-
								<u> </u>	\$1,000,001 - \$5,000,000 ×	
	\$ (\$V)									
				×	X				None –	
			10.25	91.76	100	100				
		X	X					×	\$201 <b>-</b> \$1,000 ≡	U
				100						. ₹
						×	×		\$2,501 – \$5,000 <	ĕ
70							N.C	2		<b>=</b>
						Γ			\$15,001 <b>-</b> \$50,000 <b>≦</b>	ō
131			100		1	3	12			Preceding Year
						Γ			\$100,001 - \$1,000,000 🕱	멸
							.,,			
									Over \$5,000,000 ≚	