

# FINANCIAL DISCLOSURE REPORT

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#### FILER INFORMATION

Name: Mr. Gary C. Peters

Status: Member State/District: MI14

### FILING INFORMATION

**Filing Type:** Amendment Report

Filing Year: 2013

**Filing Date:** 09/5/2014

# SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Central Michigan University 403B ⇒ Fidelity Freedom 2030		\$1,001 - \$15,000	Tax-Deferred	None	П
Community Foundation SE MI 403B Plan ⇒ American Funds EuroPacific Growth	SP	\$15,001 - \$50,000	Tax-Deferred	None	
Community Foundation SE MI 403B Plan ⇒ Dreyfus Mid Cap Index	SP	\$15,001 - \$50,000	Tax-Deferred	None	
Community Foundation SE MI 403B Plan ⇒ Fidelity Advisor Free 2020	SP	\$15,001 - \$50,000	Tax-Deferred	None	П
Community Foundation SE MI 403B Plan ⇒ Fidelity Advisor Free 2030	SP	\$15,001 - \$50,000	Tax-Deferred	None	
Community Foundation SE MI 403B Plan ⇒ Goldman Sachs FS Got	SP	\$15,001 - \$50,000	Tax-Deferred	None	
Community Foundation SE MI 403B Plan ⇒ Vanguard S&P 500 Index	SP	\$15,001 - \$50,000	Tax-Deferred	None	
Community Foundation SE MI MPP ⇒	SP	\$15,001 - \$50,000	Tax-Deferred	None	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Advisor Free 2030					
Community Foundation SE MI MPP $\Rightarrow$ Goldman Sachs FS Govt FST	SP	\$1,001 - \$15,000	Tax-Deferred	None	
Congressional Federal Credit Union ⇒ CD 58882 Comments: CD Matured 9/17/13		None	Interest	\$1 - \$200	П
Congressional Federal Credit Union ⇒ CD 59109		\$1,001 - \$15,000	Interest	\$201 - \$1,000	П
Congressional Federal Credit Union ⇒ CD 59110		\$15,001 - \$50,000	Interest	\$201 - \$1,000	П
Congressional Federal Credit Union ⇒ CD 60147		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Congressional Federal Credit Union ⇒ CD 61075		\$1,001 - \$15,000	Interest	\$1 - \$200	П
Congressional Federal Credit Union ⇒ CD 61967		\$1,001 - \$15,000	Interest	\$1 - \$200	
Congressional Federal Credit Union ⇒ CD 62660  Comments: Purchased 12/14/13		\$15,001 - \$50,000	Interest	None	
Congressional Federal Credit Union ⇒ Savings		\$1,001 - \$15,000	Interest	\$1 - \$200	П
Forgotten Harvest 401K Thrift ⇒ Mutual of America Interest Accumulation	SP	\$1,001 - \$15,000	Tax-Deferred	None	
Forgotten Harvest 401K Thrift ⇒ Vanguard VIF Diversified Value Port	SP	\$1,001 - \$15,000	Tax-Deferred	None	П
Forgotten Harvest 401K Thrift ⇒ Vanguard VIF International Portfolio COMMENTS: New fund over \$1,000 due to accumulation fro	SP	\$1,001 - \$15,000	Tax-Deferred	None	П
Gary C Peters Trust ⇒ 3M Company (MMM)	m payron c	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	

Asset	Owner Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Abbott Laboratories (ABT)				
Gary C Peters Trust ⇒ AbbVie Inc. (ABBV)	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<u> </u>
COMMENTS: SPIN OFF from Abbott Labs 01/2/2013				
Gary C Peters Trust $\Rightarrow$ Air Products and Chemicals, Inc. (APD)	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Allstate Corporation (ALL)	\$1,001 - \$15,000	Dividends	\$1 - \$200	
Gary C Peters Trust ⇒ AT&T Inc. (T)	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Bank of America Corporation (BAC)	\$15,001 - \$50,000	Dividends	\$1 - \$200	
Gary C Peters Trust ⇒ Bank of New York Mellon Corporation (BK)	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Barry Cnty Mi Ult Tax 4.5% 4/1/23	\$1,001 - \$15,000	Interest	\$201 - \$1,000	П
Gary C Peters Trust ⇒ BB&T Corporation (BBT)	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	П
Gary C Peters Trust ⇒ Birmingham MI Pub Schs 3.138% 05/01/34 COMMENTS: Purchased 5/3/13	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<b>▽</b>
Gary C Peters Trust ⇒ Brandon MI Sch Dist Ult $4.25\% 5/1/25$	\$15,001 - \$50,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Bristol-Myers Squibb Company (BMY)	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Byron Cntr Mi Pub Schs 4.0% 05/01/30	\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Carnival Corporation (CCL)	\$1,001 - \$15,000	Dividends	\$1 - \$200	
Gary C Peters Trust ⇒ Chippewa Mic Vly Sch Co 3.50% 05/01/33	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<u> </u>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
COMMENTS: Purchased 12/27/13					
Gary C Peters Trust ⇒ Chippewa Valley MI SBLF 4.0% 5/1/19		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Chippewa Valley MI Sch 4.5% 5/1/24		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Clinton Charter Twp Mich 4.4% 4/1/24		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ CMS Energy Corporation (CMS)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Coca-Cola Company (KO)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Colgate-Palmolive Company (CL)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	П
Gary C Peters Trust ⇒ ConAgra Foods, Inc. (CAG)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Dearborn Mich Ser B FGIC 4.0% 4/1/19		\$15,001 - \$50,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Detroit MI Dwntn Dev Rev 4.75% 7/1/18		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Detroit MI Sew Disp Syst 5.0% 7/1/24		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Detroit MI Sew Displ 5% 7/01/35		\$15,001 - \$50,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Detroit Mich CSD Ser B 4.0% 5/1/15  COMMENTS: Call Redemption 5/1/13		None	Interest	\$201 - \$1,000	П
Gary C Peters Trust ⇒ Detroit Mich Wtr Supply 4.5% 7/1/29		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	
Gary C Peters Trust ⇒ Dow Chemical Company (DOW)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Gary C Peters Trust ⇒ Durand Mich Area Schs 4.3% 5/1/21		\$15,001 - \$50,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ E.I. du Pont de Nemours and Company (DD)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ East Jackson Mich Cmnty 4.0% 5/1/18		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ EastGroup Properties, Inc. (EGP)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Eaton Vance Tax Advan		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Ecolab Inc. (ECL)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ General Electric Company (GE)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ General Mills, Inc. (GIS)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	П
Gary C Peters Trust ⇒ Genesee Cnty MI SWG Sys 4.5% 5/1/27		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Grand Travers Co Mich 4.25% 5/1/23		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	
Gary C Peters Trust ⇒ Healthcare Realty Trust Incorporated (HR)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ IShares MSCI EAFE Index Fund		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ J.M. Smucker Company (SJM)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Jackson Mich Cmnty College 4.5% 5/01/25		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ JP Morgan Chase & Co. (JPM)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Gary C Peters Trust ⇒ Kalamazoo MI Pub Schs 4.625% 5/1/26		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Kimberly-Clark Corporation (KMB)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Kraft Foods Group, Inc. (KRFT)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Leggett & Platt, Incorporated (LEG)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Lowell Mich Area Schs 4.5% 5/1/25		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Lowe's Companies, Inc. (LOW)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Mattel, Inc. (MAT)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ McDonald's Corporation (MCD)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Medley Capital Corporation (MCC)  COMMENTS: Purchased 12/30/13		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<u>~</u>
Gary C Peters Trust ⇒ Medtronic Inc. (MDT)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Merck & Company, Inc. Common Stock (MRK)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ MetLife, Inc. (MET)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Michigan Fin Auth 4.0% 12/01/25		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Michigan Mun Bd Auth Rev 5.0% 11/01/32		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	
Gary C Peters Trust ⇒		\$1,001 - \$15,000	Interest	\$201 - \$1,000	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Michigan St Hosp Fin Aut 5.0% 11/15/25					
Gary C Peters Trust ⇒ Michigan St Hosp Fin Auth 5.25% 11/15/32		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Michigan St Univ 4.0% 08/15/27		\$1,001 - \$15,000	Interest	\$201 - \$1,000	П
Gary C Peters Trust ⇒ Microsoft Corporation (MSFT)  Comments: Purchased additional shares 8/8/13		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<b>V</b>
Gary C Peters Trust ⇒  Mondelez International, Inc Class A (MDLZ)  Comments: Bought additional shares 7/2/13		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<b>V</b>
Gary C Peters Trust ⇒ Monroe Cnty Mich Bldg 4.25% 4/1/24		\$15,001 - \$50,000	Interest	\$201 - \$1,000	П
Gary C Peters Trust ⇒ NiSource Inc (NI)		\$1,001 - \$15,000	Dividends	\$1 - \$200	
Gary C Peters Trust ⇒ North Gratiot Interceptr 4.125% 5/1/24		\$1,001 - \$15,000	Interest	\$201 - \$1,000	П
Gary C Peters Trust ⇒ Pall Corporation (PLL)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	П
Gary C Peters Trust ⇒ Parchment MI Sch Dist 07 4.375% 5/1/25		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	
Gary C Peters Trust ⇒ Pentwater Mi Pub Schs 2.65% 03/05/13  Comments: Purchased 2/15/13 Sold 12/27/13		None	None		<b>∀</b>
Gary C Peters Trust ⇒ PEPCO Holdings, Inc (POM)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Pepsico, Inc. (PEP)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Pfizer, Inc. (PFE)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒		None	Interest	\$201 - \$1,000	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Plymouth Canton MI CSD 5/1/17					
Comments: Call Redemption 5/1/13					
Gary C Peters Trust ⇒ Portage Mich Transn Fd 4.3% 12/1/20		\$15,001 - \$50,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ PPG Industries, Inc. (PPG)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Procter & Gamble Company (PG)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	
Gary C Peters Trust ⇒ Rochester Mich Cmnty Sch 5.0% 5/1/19		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
Gary C Peters Trust ⇒ Sherwin-Williams Company (SHW)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Total S.A. (TOT)  Comments: Purchased additional share 5/6/13		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<u> </u>
Gary C Peters Trust ⇒ Verizon Communications Inc. (VZ)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Wal-Mart Stores, Inc. (WMT)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Gary C Peters Trust ⇒ Warren Woods MI PS Go UT 4.5% 5/1/22		\$1,001 - \$15,000	Interest	\$201 - \$1,000	
MESP- Alana Peters ⇒ Global Equity Index Option	DC	\$15,001 - \$50,000	Tax-Deferred	None	
MESP- Alana Peters ⇒ Principal Plus Interest Option	DC	\$15,001 - \$50,000	Tax-Deferred	None	
MESP- Madeleine Peters ⇒ Global Equity Index Option	DC	\$15,001 - \$50,000	Tax-Deferred	None	
MESP- Madeleine Peters ⇒ Principal Plus Interest Option	DC	\$15,001 - \$50,000	Tax-Deferred	None	
Metlife Annuity		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	П

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual Life Insurance		\$15,001 - \$50,000	Interest	\$201 - \$1,000	
State of MI 401K ⇒ American Fund Eruopacific Growth		\$15,001 - \$50,000	Tax-Deferred	None	П
State of MI 401K ⇒ Dodge & Cox		\$15,001 - \$50,000	Tax-Deferred	None	П
State of MI 401K ⇒ SSgA Target Retirement 2025		\$1,001 - \$15,000	Tax-Deferred	None	П
State of MI 401K ⇒ Stable Value		\$50,001 - \$100,000	Tax-Deferred	None	П
State of MI $401K \Rightarrow$ T Rowe Price Midcap Value		\$15,001 - \$50,000	Tax-Deferred	None	П
State of MI 457 ⇒ American Fund Europacific Growth		\$1,001 - \$15,000	Tax-Deferred	None	П
State of MI 457 ⇒ Ranier Large Cap Growth		\$1,001 - \$15,000	Tax-Deferred	None	П
State of MI 457 ⇒ RidgeWorth Funds		\$1,001 - \$15,000	Tax-Deferred	None	П
State of MI 457 ⇒ SsgA S&P 500 Index		\$15,001 - \$50,000	Tax-Deferred	None	П
State of MI 457 ⇒ SSgA S&P Mid Cap Index		\$15,001 - \$50,000	Tax-Deferred	None	
State of MI 457 ⇒ Stable Value		\$15,001 - \$50,000	Tax-Deferred	None	
Transamerica Advisors Life Insurance		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	П
UBS AG Regs Ord Chf COMMENTS: Previous name UBS AG New 2006 Ord Chf	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	П
UBS IRA ⇒ American Funds Investment Company of America	SP	\$1,001 - \$15,000	Tax-Deferred	None	П

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
UBS IRA ⇒ Ford Motor Company (F)  Comments: Purchased 2/19/13	SP	\$15,001 - \$50,000	Tax-Deferred	None	
UBS IRA ⇒ Intel Corporation (INTC) COMMENTS: Purchased 6/27/13	SP	\$15,001 - \$50,000	Tax-Deferred	None	<b>▽</b>
UBS IRA $\Rightarrow$ Invesco American Franchise Fund Comments: Exchanged from Invesco Constellation 9/17/13	SP	\$1,001 - \$15,000	Tax-Deferred	None	<b>▽</b>
UBS IRA ⇒ Johnson & Johnson (JNJ)	SP	\$15,001 - \$50,000	Tax-Deferred	None	
UBS IRA ⇒ Nordstrom, Inc. (JWN)  COMMENTS: Purchased 10/30/13	SP	\$1,001 - \$15,000	Tax-Deferred	None	<b>~</b>
UBS IRA ⇒ United Parcel Service, Inc. (UPS)  Comments: Purchased 7/2/13	SP	\$15,001 - \$50,000	Tax-Deferred	None	<b>~</b>
UBS Madeleine Peters ⇒ American Funds Investment Co of America	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	
UBS Madeleine Peters ⇒ Bear Stearns Companies Adj Rate  DESCRIPTION: 3.07219% Matures 01/10/14	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	П
UBS Madeleine Peters ⇒ Invesco American Franchise Fund Comments: Exchanged from Invesco Constellation 9/17/13	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<b>▽</b>
UBS Madeleine Peters ⇒ Pace Large Co Growth Equity	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	
UBS SEP ⇒ Aetna Inc NTS 2.75% 11/15/22  DESCRIPTION: 2.750% Matures 11/15/22  COMMENTS: Purchased 1/7/13		\$15,001 - \$50,000	Tax-Deferred	None	<b>▽</b>
UBS SEP ⇒ Alabama Power Co 5.125% 2/15/19		\$1,001 - \$15,000	Tax-Deferred	None	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
UBS SEP ⇒ Amer Intl Group 5.85% 1/16/18  DESCRIPTION: 5.85% Matures 1/16/18		\$15,001 - \$50,000	Tax-Deferred	None	
UBS SEP ⇒ Anheuser Busch Cos 5.0% 3/1/19 DESCRIPTION: 5.000% Matures 03/01/19		\$15,001 - \$50,000	Tax-Deferred	None	=
UBS SEP $\Rightarrow$ AT&T Inc 2.625% 12/01/22  DESCRIPTION: 2.625% Matures 12/01/22  COMMENTS: Purchased 1/7/13		\$15,001 - \$50,000	Tax-Deferred	None	<b>V</b>
UBS SEP ⇒ Bank of Amer Internotes 4.3% 11/15/19  DESCRIPTION: 4.300% Matures 11/15/19		\$15,001 - \$50,000	Tax-Deferred	None	
UBS SEP ⇒ BB&T Corp 5.25% 11/1/19 Description: 5.250% Matures 11/01/19		\$15,001 - \$50,000	Tax-Deferred	None	П
UBS SEP ⇒ Calamos Strategic Total Return		\$1,001 - \$15,000	Tax-Deferred	None	
UBS SEP ⇒ Carolina First Bk Sc US 3.76% 11/26/13 COMMENTS: Call Redemption 11/26/13		None	Tax-Deferred	None	П
$\begin{array}{c} \text{UBS SEP} \Rightarrow \\ \text{CBRE Clarion Global Real Estate} \end{array}$		\$1,001 - \$15,000	Tax-Deferred	None	
UBS SEP ⇒ Cisco Systems, Inc. (CSCO) COMMENTS: Purchased 10/30/13 & 12/27/13		\$15,001 - \$50,000	Tax-Deferred	None	<b>~</b>
UBS SEP ⇒ CIT Group Inc (CIT)		\$1 - \$1,000	Tax-Deferred	None	
UBS SEP ⇒ Clorox Company (CLX) Comments: Purchased 7/22/13		\$15,001 - \$50,000	Tax-Deferred	None	<b>~</b>
UBS SEP ⇒ Dow Chemical Co 2.9% 5/15/16  DESCRIPTION: 2.900% Matures 05/15/16		\$15,001 - \$50,000	Tax-Deferred	None	

Asset	Owner Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
UBS SEP ⇒ DWS Rreef Real Estate	\$1 - \$1,000	Tax-Deferred	None	
UBS SEP ⇒ Education Realty Trust, Inc. (EDR) Comments: Purchased 12/27/13	\$1,001 - \$15,000	Tax-Deferred	None	<b>▽</b>
UBS SEP ⇒ Ford Motor Credit 3.25% 6/20/14  DESCRIPTION: 3.25% Matures 06/20/14	\$15,001 - \$50,000	Tax-Deferred	None	
UBS SEP ⇒ Ford Motor Credit Co 3.45% 08/20/20 DESCRIPTION: 3.450% Matures 08/20/20	\$15,001 - \$50,000	Tax-Deferred	None	~
UBS SEP ⇒ GE Capital Internotes 5.0% 3/15/16  DESCRIPTION: 5.0% Matures 03/15/16  COMMENTS: Call Redemption 9/16/13	None	Tax-Deferred	None	П
UBS SEP ⇒ GE Capital Internotes 6.0% 8/15/19  DESCRIPTION: 6.0% Matures 8/15/19  COMMENTS: Call Redemption 2/15/13	None	Tax-Deferred	None	П
UBS SEP ⇒ GE Capital Internotes 6.15% 7/15/19  DESCRIPTION: 6.15% Matures 7/15/19  COMMENTS: Call Redemption 7/15/13	None	Tax-Deferred	None	П
UBS SEP ⇒ GE Capital Retail UT US 1.6% 12/23/19	\$15,001 - \$50,000	Tax-Deferred	None	
UBS SEP ⇒ GE Capital Retail UT US 1.9% 12/31/18  DESCRIPTION: 1.9000% Matures 12/31/18  COMMENTS: Purchased 12/31/13	\$15,001 - \$50,000	Tax-Deferred	None	<u> </u>
UBS SEP ⇒ GMAC SmartNotes 6.2% 3/15/16  DESCRIPTION: 6.2% Matures 3/15/16  COMMENTS: Call Redemption 9/16/13	None	Tax-Deferred	None	п
UBS SEP ⇒ Goldman Sachs Group Inc 3.625% 02/07/16	\$1,001 - \$15,000	Tax-Deferred	None	П

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Description: 3.625% Matures 02/07/16					
UBS SEP ⇒ Goldman Sachs Group Inc Notes 10/1/14		\$1,001 - \$15,000	Tax-Deferred	None	П
DESCRIPTION: 5.000% Matures 10/01/14					
UBS SEP ⇒ Home Depot 5.4% 3/1/16  DESCRIPTION: 5.400% Matures 03/01/16		\$15,001 - \$50,000	Tax-Deferred	None	П
UBS SEP ⇒ ING Prime Rate Trust		\$1,001 - \$15,000	Tax-Deferred	None	
UBS SEP ⇒ John Hancock Signatures 5.75% 11/15/18		\$1,001 - \$15,000	Tax-Deferred	None	
Description: 5.750% Matures 11/15/18					
UBS SEP ⇒ JP Morgan Chase 2.6% $1/15/16$		\$15,001 - \$50,000	Tax-Deferred	None	
DESCRIPTION: 2.60% Matures 01/15/16					
$\begin{array}{l} \text{UBS SEP} \Rightarrow \\ \text{Medical Properties Trust, Inc. common stock (MPW)} \end{array}$		\$1,001 - \$15,000	Tax-Deferred	None	
UBS SEP ⇒ Merrill Lynch NTS 5/5/14		\$1,001 - \$15,000	Tax-Deferred	None	
Description: Adj Rate 3.23493 Matures 05/05/14					
UBS SEP ⇒ Morgan Stanley Adj Rate 12/15/19		\$15,001 - \$50,000	Tax-Deferred	None	П
Description: Adj Rate Matures 12/15/19					
UBS SEP ⇒ Morgan Stanley NTS 3.1% 11/09/18		\$1,001 - \$15,000	Tax-Deferred	None	
DESCRIPTION: 3.100% Matures 11/09/18					
UBS SEP ⇒ Morgan Stanley Step-Up 4% 07/30/20		None	Tax-Deferred	None	
DESCRIPTION: 4.0% Matures 07/30/20 COMMENTS: Call Redemption 7/30/13					
UBS SEP ⇒ New York Times Co $3/15/15$		\$1,001 - \$15,000	Tax-Deferred	None	
Description: 5.000% 03/15/15					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
UBS SEP ⇒ Prudential Fincl Inc 6.0% 10/15/18  DESCRIPTION: 6.0% Matures 10/15/18  COMMENTS: Call Redemption 4/15/13		None	Tax-Deferred	None	П
UBS SEP ⇒ QUALCOMM Incorporated (QCOM) COMMENTS: Bought 10/30/13		\$1,001 - \$15,000	Tax-Deferred	None	<b>~</b>
UBS SEP ⇒ Royal Bank of Scotland 3.75% 11/15/17  DESCRIPTION: 3.75% Matures 11/15/17		\$1,001 - \$15,000	Tax-Deferred	None	П
UBS SEP ⇒ SPDR S&P 500 ETF		\$15,001 - \$50,000	Tax-Deferred	None	
UBS SEP ⇒ SPDR S&P Dividend ETF		\$15,001 - \$50,000	Tax-Deferred	None	
UBS SEP ⇒ SPDR S&P Midcap 400 ETF		\$15,001 - \$50,000	Tax-Deferred	None	
UBS SEP ⇒ Stanley Black & Decker, Inc. (SWK) Comments: Purchased 12/27/13		\$1,001 - \$15,000	Tax-Deferred	None	<b>~</b>
UBS SEP ⇒ UBS AG Jersey 3.75% 08/04/15  DESCRIPTION: 3.75% Matures 08/04/15  COMMENTS: Call Redemption 8/5/13		None	Tax-Deferred	None	П
UBS UGTMA $_1 \Rightarrow$ American Funds Investment Company of America	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	
UBS UGTMA 1 ⇒ Bear Stearns Companies Adj Rate  DESCRIPTION: 3.07219% Matures 01/10/14	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	П
UBS UGTMA 1 $\Rightarrow$ Invesco American Franchise Fund Comments: Exchanged from Invesco Constellation 9/17/13	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<b>▽</b>
UBS UGTMA $_1 \Rightarrow$ Pace Large Co Growth Equity	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	П

# SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Gary C Peters Trust ⇒ AbbVie Inc. (ABBV)		01/2/2013	P	\$1,001 - \$15,000	
DESCRIPTION: SPIN OFF from Abbott Laboratories					
Gary C Peters Trust ⇒ Birmingham MI Pub Schs 3.0% 05/01/34		05/3/2013	P	\$1,001 - \$15,000	
Gary C Peters Trust ⇒ Chippewa Mic Vly Sch Co 3.5% 05/01/33		12/27/2013	P	\$1,001 - \$15,000	
Gary C Peters Trust ⇒ Medley Capital Corporation (MCC)		12/30/2013	P	\$1,001 - \$15,000	
Gary C Peters Trust ⇒ Microsoft Corporation (MSFT)  COMMENTS: Bought additional shares 8/8/13		08/8/2013	P	\$1,001 - \$15,000	
COMMENTS: BOUGHT auditional shares 0/0/13					
Gary C Peters Trust ⇒ Mondelez International, Inc Class A (MDLZ)		07/2/2013	P	\$1,001 - \$15,000	
Comments: Bought additional shares 7/2/13					
Gary C Peters Trust ⇒ Pentwater MI Pub Schs 2.65% 05/01/28		02/15/2013	P	\$1,001 - \$15,000	
Gary C Peters Trust ⇒ Pentwater MI Pub Schs 2.65% 05/01/28		12/27/2013	S	\$1,001 - \$15,000	П
Gary C Peters Trust ⇒ Total S.A. (TOT)		05/6/2013	P	\$1,001 - \$15,000	
UBS IRA ⇒ Intel Corporation (INTC)	SP	06/27/2013	P	\$1,001 - \$15,000	
UBS IRA ⇒ Invesco American Franchise Fund Comments: Exchanged from Invesco Constellation	SP	09/17/2013	E	\$1,001 - \$15,000	
UBS IRA ⇒ Nordstrom, Inc. (JWN)	SP	10/30/2013	P	\$1,001 - \$15,000	

 $<sup>\</sup>ensuremath{^*}$  Asset class details available at the bottom of this form.

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
UBS IRA ⇒ United Parcel Service, Inc. (UPS)	SP	07/2/2013	P	\$15,001 - \$50,000	
UBS Madeleine Peters ⇒ Invesco American Franchise Fund Description: Exchanged from Invesco Constellation	DC	09/17/2013	E	\$1,001 - \$15,000	
UBS SEP ⇒ Aetna Inc NTS 2.75% 11/15/22  DESCRIPTION: 2.75% Matures 11/15/22		01/7/2013	P	\$15,001 - \$50,000	
UBS SEP $\Rightarrow$ AT&T Inc 2.625% 12/01/22  DESCRIPTION: 2.625% Matures 12/01/22		01/7/2013	P	\$15,001 - \$50,000	
UBS SEP ⇒ Cisco Systems, Inc. (CSCO)		10/30/2013	P	\$1,001 - \$15,000	
UBS SEP ⇒ Cisco Systems, Inc. (CSCO)		12/27/2013	P	\$1,001 - \$15,000	
UBS SEP ⇒ Clorox Company (CLX)		07/22/2013	P	\$15,001 - \$50,000	
UBS SEP ⇒ Education Realty Trust, Inc. (EDR)		12/27/2013	P	\$1,001 - \$15,000	
UBS SEP ⇒ Ford Motor Credit Co LLC 3.45% 08/20/20 DESCRIPTION: 3.450% Matures 08/20/20		02/19/2013	P	\$15,001 - \$50,000	
UBS SEP ⇒ GE Capital Retail UT US 1.9000% Mat 12/31/2018  DESCRIPTION: 1.9000% Mat 12/31/2018		12/31/2013	P	\$15,001 - \$50,000	
UBS SEP ⇒ QUALCOMM Incorporated (QCOM)		10/30/2013	P	\$1,001 - \$15,000	
UBS SEP ⇒ Stanley Black & Decker, Inc. (SWK)		12/27/2013	P	\$1,001 - \$15,000	
UBS UGTMA 1 ⇒ Invesco American Franchise Fund  Description: Exchange from Invesco Constellation	DC	09/17/2013	E	\$1,001 - \$15,000	

Asset Owner Date	Tx. Amount Type	Cap. Gains > \$200?
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<sup>\*</sup> Asset class details available at the bottom of this form.

## SCHEDULE C: EARNED INCOME

Source	Туре	Amount
Forgotten Harvest	Spouse Salary	N/A
MI Legislative Retirement System	Legislative Pension	\$3,439

## SCHEDULE D: LIABILITIES

Owner Creditor	Date Incurred	Туре	Amount of Liability
UBS Mortgage/ Wells Fargo	Feb 2003	Home Equity Loan	\$10,000 - \$15,000
BB&T	January 2013	Mortgage on DC Co-Op	\$100,001 - \$250,000

## **S**CHEDULE **E**: **P**OSITIONS

Position	Name of Organization
Director (Uncompensated)	Detroit Economic Growth Corporation

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2003	Myself and the Michigan Legislative Retirement System	Participation in Michigan Legislative Retirement Health Program
December 2013	Myself and the Michigan Legislative Retirement System	Participation in Michigan Legislative Pension program

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

	Trip l	Details			Inclusions	
Source	Start Date	End Date	Itinerary	Lodging?	Food?	Family?
Detroit Regional Chamber of Commerce	05/29/2013	05/30/2013	Mackinac City - Mackinac Island - Mackinac City	<b>V</b>	<b>✓</b>	<u> </u>

#### SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

#### SCHEDULE A AND B ASSET CLASS DETAILS

<ul> <li>Centra</li> </ul>	l Michigan	University	⊿ดงB

- o Community Foundation SE MI 403B Plan (Owner: SP)
- o Community Foundation SE MI MPP (Owner: SP)
- o Congressional Federal Credit Union

LOCATION: US

- Forgotten Harvest 401K Thrift (Owner: SP)
- o Gary C Peters Trust

Description: UBS Resource Management Account Gary C Peters Trust U/A DTD 8-11-04

• MESP- Alana Peters (Owner: DC)

LOCATION: MI

• MESP- Madeleine Peters (Owner: DC)

LOCATION: MI

- o State of MI 401K
- o State of MI 457
- UBS IRA (Owner: SP)
- o UBS Madeleine Peters (Owner: DC)

LOCATION: US

DESCRIPTION: Former UGTMA

- UBS SEP
- UBS UGTMA 1 (Owner: DC)

LOCATION: US

### EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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

∇es 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?

C Yes No

### **C**OMMENTS

### CERTIFICATION AND SIGNATURE

 $\overline{\mathbb{M}}$  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. Gary C. Peters, 09/5/2014