

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Suzanne Bonamici

Status: Member State/District: OR01

FILING INFORMATION

Filing Type: Annual Report

Filing Year: 2015

Filing Date: 05/13/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Managed Asset Account ⇒ Active Portfolio Multi Manager Small Cap Equity CLA	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	∀
Ameriprise Managed Asset Account ⇒ Active Portfolio Multi Manager Value CLA	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	V
Ameriprise Managed Asset Account ⇒ Blackrock Strategic Inc. Opptys Investor CLA	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	▽
Ameriprise Managed Asset Account \Rightarrow Columbia Disciplined Growth CLA	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	▽
Ameriprise Managed Asset Account ⇒ Columbia Select Large Cap Growth CLA	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<u>~</u>
Ameriprise Managed Asset Account ⇒ Columbia Small Cap Core CLA	JT	None	Capital Gains, Dividends	\$2,501 - \$5,000	<u>~</u>
Ameriprise Managed Asset Account ⇒ Deutsche Global Real Estate Securities CLA	JT	None	Capital Gains, Dividends	\$201 - \$1,000	<u>~</u>
Ameriprise Managed Asset Account ⇒	JT	None	Capital Gains,	\$201 -	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JP Morgan Strategic Income Opptys CLA			Dividends	\$1,000	
Ameriprise Managed Asset Account ⇒ MFS Emerging Markets Debt CLA	JT	None	Capital Gains, Dividends	\$201 - \$1,000	▽
Ameriprise Managed Asset Account \Rightarrow MFS Intl Value CLA	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	✓
Ameriprise Managed Asset Account ⇒ MFS Municipal High Inc. CLA	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	▽
Ameriprise Managed Asset Account \Rightarrow MFS Value CLA	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	▽
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl Growth CLA	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	▽
Ameriprise Managed Asset Account ⇒ Prudential Jennison Mid Cap Growth CLA	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	✓
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CLA	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	✓
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Municipal CLA	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	✓
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Short Term Municipal Bond CLA	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	✓
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Special Mid Cap Value CLA	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	✓
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	✓
Michael H. Simon Beneficiary IRA at Ameriprise ⇒ Ameriprise cash holding	SP	\$100,001 - \$250,000	Dividends	\$1 - \$200	П
Michael H. Simon Royalties ⇒ International Authors Society (Odd Couple royalties) Description: Royalties from Odd Couple in 2015.	SP	\$15,001 - \$50,000	Royalties	\$5,001 - \$15,000	П
Michael H. Simon Royalties ⇒ Samuel French, Inc. (Odd Couple royalties)	SP	\$15,001 - \$50,000	Royalties	\$15,001 - \$50,000	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Royalties from Odd Couple in 2015.					
Michael H. Simon Royalties ⇒ Tams-Witmark Music Library, Inc. (Promises, Promises royalties)	SP	\$1,001 - \$15,000	Royalties	\$2,501 - \$5,000	П
Description: Royalties from Promises, Promises in 2015.					
Miscellaneous Assets Jointly Owned ⇒ Ameriprise cash holding	JT	\$15,001 - \$50,000	Capital Gains, Interest	\$1 - \$200	
Miscellaneous Assets Jointly Owned \Rightarrow Gold Coins	JT	\$50,001 - \$100,000	None		П
Description: Gold coins					
Miscellaneous Assets Jointly Owned ⇒ Innsmouth Partners, LLC (motion picture production company; Hillsboro, OR; hold no investment)	JT	\$1,001 - \$15,000	None		
DESCRIPTION: Location: Hillsboro / Washington County, OR, US investment	Description	: Motion picture prod	uction company; Hills	boro, OR; hol	d no
Miscellaneous Assets Jointly Owned ⇒ Northwestern Mutual Life Ins. (life ins. cash value)	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	
DESCRIPTION: Cash value of Northwestern Mutual Life Insurance	policy.				
Miscellaneous Assets Jointly Owned \Rightarrow Oregon State Dept. of Admin. Services, Municipal Bond	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	
DESCRIPTION: Oregon State Department of Administrative Service	es Municipa	ll Bond.			
Miscellaneous Assets Jointly Owned \Rightarrow US Bank NA	JT	\$100,001 - \$250,000	Interest	\$201 - \$1,000	П
Suzanne's Personal Assets ⇒ OnPoint Community Credit Union (check and savings)		\$50,001 - \$100,000	Interest	\$1 - \$200	П
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index mutual fund	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	<u>~</u>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Capital Opportunity Mutual Fund	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<u>~</u>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Emerging Markets Stock Index mutual fund	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Energy Mutual Fund	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard European Stock Index mutual fund	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Explorer mutual fund	SP	\$100,001 - \$250,000	Dividends	\$15,001 - \$50,000	V
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Global ex-U.S. Real Estate Index mutual fund	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	П
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Health Care mutual fund	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Inflation-Protected Securities mutual fund	SP	None	Dividends	\$201 - \$1,000	▽
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP mutual fund	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	V
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard REIT Index mutual fund	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Small-Cap Index mutual fund	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	✓

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

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Active Portfolio Multi Manager Small Cap Equity CLA	JT	07/15/2015	P	\$50,001 - \$100,000	
Ameriprise Managed Asset Account ⇒ Active Portfolio Multi Manager Small Cap Equity CLA	JT	10/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Active Portfolio Multi Manager Value CLA	JT	01/16/2015	S (partial)	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Active Portfolio Multi Manager Value CLA	JT	04/24/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Active Portfolio Multi Manager Value CLA	JT	07/15/2015	P	\$1,001 - \$15,000	

Asset	Owner	· Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Active Portfolio Multi Manager Value CLA	JT	10/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Blackrock Strategic Inc. Opptys Investor CLA	JT	01/16/2015	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ Blackrock Strategic Inc. Opptys Investor CLA	JT	04/24/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Blackrock Strategic Inc. Opptys Investor CLA	JT	07/15/2015	S (partial)	\$124.00	
Ameriprise Managed Asset Account ⇒ Blackrock Strategic Inc. Opptys Investor CLA	JT	10/16/2015	S (partial)	\$1,001 - \$15,000	П
Ameriprise Managed Asset Account ⇒ Columbia Disciplined Growth CLA	JT	01/16/2015	S (partial)	\$1,001 - \$15,000	<u>~</u>
Ameriprise Managed Asset Account ⇒ Columbia Disciplined Growth CLA	JT	04/24/2015	S (partial)	\$1,001 - \$15,000	▽
Ameriprise Managed Asset Account ⇒ Columbia Disciplined Growth CLA	JT	07/15/2015	S (partial)	\$975.00	П
Ameriprise Managed Asset Account ⇒ Columbia Disciplined Growth CLA	JT	10/16/2015	S (partial)	\$668.00	П
Ameriprise Managed Asset Account ⇒ Columbia Select Large Cap Growth CLA	JT	01/16/2015	S (partial)	\$1,001 - \$15,000	П
Ameriprise Managed Asset Account ⇒ Columbia Select Large Cap Growth CLA	JT	04/24/2015	S (partial)	\$1,001 - \$15,000	∀
Ameriprise Managed Asset Account ⇒ Columbia Select Large Cap Growth CLA	JT	07/15/2015	S (partial)	\$1,001 - \$15,000	П
Ameriprise Managed Asset Account ⇒ Columbia Select Large Cap Growth CLA	JT	10/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Columbia Small Cap Core CLA	JT	01/16/2015	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Columbia Small Cap Core CLA	JT	04/24/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Columbia Small Cap Core CLA	JT	07/15/2015	S	\$50,001 - \$100,000	▽
Ameriprise Managed Asset Account ⇒ Deutsche Global Real Estate Securities CLA	JT	01/16/2015	S (partial)	\$1,001 - \$15,000	<u>~</u>
Ameriprise Managed Asset Account ⇒ Deutsche Global Real Estate Securities CLA	JT	04/24/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Deutsche Global Real Estate Securities CLA	JT	07/15/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Deutsche Global Real Estate Securities CLA	JT	10/16/2015	S	\$15,001 - \$50,000	<u> </u>
Ameriprise Managed Asset Account ⇒ JP Morgan Strategic Income Opptys CLA	JT	01/16/2015	S	\$15,001 - \$50,000	▽
Ameriprise Managed Asset Account ⇒ MFS Emerging Markets Debt CLA	JT	04/24/2015	S	\$15,001 - \$50,000	▽
Ameriprise Managed Asset Account \Rightarrow MFS Intl Value CLA	JT	01/16/2015	S (partial)	\$1,001 - \$15,000	П
$\begin{array}{l} \text{Ameriprise Managed Asset Account} \Rightarrow \\ \text{MFS Intl Value CLA} \end{array}$	JT	04/24/2015	S (partial)	\$1,001 - \$15,000	▽
Ameriprise Managed Asset Account \Rightarrow MFS Intl Value CLA	JT	10/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MFS Municipal High Inc. CLA	JT	04/24/2015	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ MFS Municipal High Inc. CLA	JT	07/15/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MFS Municipal High Inc. CLA	JT	10/16/2015	S (partial)	\$1,001 - \$15,000	П
Ameriprise Managed Asset Account ⇒ MFS Value CLA	JT	01/16/2015	S (partial)	\$1,001 - \$15,000	<u>~</u>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ MFS Value CLA	JT	04/24/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MFS Value CLA	JT	07/15/2015	S (partial)	\$15,001 - \$50,000	<u></u>
Ameriprise Managed Asset Account ⇒ MFS Value CLA	JT	10/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl Growth CLA	JT	04/24/2015	S (partial)	\$15,001 - \$50,000	<u>~</u>
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl Growth CLA	JT	07/15/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl Growth CLA	JT	10/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Prudential Jennison Mid Cap Growth CLA	JT	01/16/2015	S (partial)	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Prudential Jennison Mid Cap Growth CLA	JT	04/27/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Prudential Jennison Mid Cap Growth CLA	JT	07/15/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Prudential Jennison Mid Cap Growth CLA	JT	10/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CLA	JT	01/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CLA	JT	04/24/2015	S (partial)	\$1,001 - \$15,000	<u></u>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CLA	JT	07/15/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CLA	JT	10/16/2015	S (partial)	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒	JT	04/24/2015	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Advantage Municipal CLA					
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Municipal CLA	JT	10/16/2015	S (partial)	\$1,001 - \$15,000	П
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Short Term Municipal Bond CLA	JT	01/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Short Term Municipal Bond CLA	JT	04/24/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Short Term Municipal Bond CLA	JT	07/15/2015	S (partial)	\$320.00	П
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Short Term Municipal Bond CLA	JT	10/16/2015	S (partial)	\$1,001 - \$15,000	П
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Special Mid Cap Value CLA	JT	01/16/2015	S (partial)	\$264.00	П
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Special Mid Cap Value CLA	JT	04/24/2015	S (partial)	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Special Mid Cap Value CLA	JT	10/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA	JT	01/16/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA	JT	04/24/2015	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA	JT	07/15/2015	S (partial)	\$579.00	П
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA	JT	10/16/2015	S (partial)	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index mutual fund	SP	09/2/2015	P	\$100,001 - \$250,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Capital Opportunity mutual fund	SP	09/2/2015	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Explorer mutual fund	SP	09/2/2015	P	\$100,001 - \$250,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Inflation-Protected Securities mutual fund	SP	09/2/2015	S	\$500,001 - \$1,000,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP mutual fund	SP	09/2/2015	P	\$15,001 - \$50,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Small-Cap Index mutual fund	SP	09/2/2015	P	\$100,001 - \$250,000	

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

SCHEDULE C: EARNED INCOME

Source	Туре	Amount
United States Judges (Administrative Office of U.S. Courts	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Member (minority interest; no control or managerial responsibility)	Insmouth Partners, LLC (motion picture production company; Hillsboro, OR; holds no investments)

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

		Trip Details	s	Inclusions			
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Humpty Dumpty Institute	12/3/2015	12/5/2015	Washington, DC - New York, NY - Washington, DC	3	∀	▽	▽

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

o Ameriprise Managed Asset Account (Owner: JT)

LOCATION: US

• Michael H. Simon Beneficiary IRA at Ameriprise (Owner: SP)

LOCATION: US

o Michael H. Simon Royalties (Owner: SP)

LOCATION: US

• Miscellaneous Assets Jointly Owned (Owner: JT)

LOCATION: US

o Suzanne's Personal Assets

LOCATION: US

• The Michael H. Simon Rollover IRA at Vanguard (Owner: SP)

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?

© 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?

C 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

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: Hon. Suzanne Bonamici, 05/13/2016