

UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2009 FINANCIAL DISCLOSURE STATEMENT

For use by Members, officers, and employees

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K. Jacqueline Speier
(Full Name)

202-225-3531
(Daytime Telephone)

2010 JUN 17 PM 5:56
(Office Use Only)

**HAND
DELIVERED**

Filer ☒ Member of the U.S. House of Representatives
State: CA District: 12

☐ Officer Or Employee
Employing Office:

Report Type

☒ Annual (May 1 - April 30)

☐ Amendment

☐ Termination

Termination Date:

A \$200 penalty shall be assessed against anyone who files more than 30 days late.

PRELIMINARY INFORMATION -- ANSWER EACH OF THESE QUESTIONS

I. Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$335 and not otherwise exempt)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule I.		If yes, complete and attach Schedule VI.	
II. 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?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$335 from one source)?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
If yes, complete and attach Schedule II.		If yes, complete and attach Schedule VII.	
III. 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 \$1,000 at the end of the period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
If yes, complete and attach Schedule III.		If yes, complete and attach Schedule VIII.	
IV. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
If yes, complete and attach Schedule IV.		If yes, complete and attach Schedule IX.	
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.	
If yes, complete and attach Schedule V.			

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION -- ANSWER EACH OF THESE QUESTIONS

Trusts-- Details regarding "Qualified Blind Trusts" approved by the Committee on Standards of Official Conduct 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 <input type="checkbox"/> No <input checked="" type="checkbox"/>
Exemptions-- 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? Do not answer "Yes" unless you have first consulted with the Committee on Standards of Official Conduct.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

SCHEDULE I - EARNED INCOME

Name K. Jacqueline Speier

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$200 or more during the preceding calendar year. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000.

Source	Type	Amount
Strategic Investment Solutions, Inc. San Francisco, CA	Spouse Salary	N/A

SCHEDULE II - PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Name K. Jacqueline Speier

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List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of an honorarium. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Standards of Official Conduct. A green envelope for transmitting the list is included in each Member's filing package. Employees may request a green envelope from the Clerk or use a plain envelope that is appropriately labeled.

Source	Activity	Date	Amount
Soroptimist International of San Francisco	Speech	March 28, 2009	\$1,000

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BLOCK A	BLOCK B	BLOCK C	BLOCK D	BLOCK E
Asset and/or Income Source	Year-End Value of Asset	Type of Income	Amount of Income	Transaction
<p>Identify (a) each asset held for investment or production of income with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other assets or sources of income which generated more than \$200 in "unearned" income during the year. For rental property or land, provide a complete address. Provide full names of stocks and mutual funds (do not use ticker symbols). For all IRAs and other retirement plans (such as 401(k) plans) that are self-directed (i.e., plans in which you have the power, even if not exercised, to select the specific investments), provide the value and income information on each asset in the account that exceeds the reporting threshold. For retirement plans that are not self-directed, name the institution holding the account and its value at the end of the reporting period. For an active business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. For additional information, see the instruction booklet.</p> <p>Exclude: Your personal residence(s) (unless there is rental income); any debt owed to you by your spouse, or by your or your spouse's child, parent or sibling; any deposits totaling \$5,000 or less in personal savings accounts; any financial interest in or income derived from U.S. Government retirement programs.</p> <p>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 (JT), in the optional column on the far left.</p>	<p>at close of reporting year. If you use a valuation method other than fair market value, please specify the method used. If an asset was sold and is included only because it is generated income, the value should be "None."</p>	<p>Check all columns that apply. For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA". For all other assets including all IRAs, indicate the type of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if asset did not generate any income during the calendar year.</p>	<p>For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, including all IRAs, indicate the category of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if no income was earned or generated.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
33 Park Road, #7 Burlingame, CA 94010	\$500,001 - \$1,000,000	RENT	\$15,001 - \$50,000	
4305 Auburn Blvd. Sacramento, CA 95814	\$1,000,001 - \$5,000,000	RENT	\$100,001 - \$1,000,000	
620 Stonegate Drive S. San Francisco, CA 94080	\$250,001 - \$500,000	RENT	\$15,001 - \$50,000	
730 Alhambra Sacramento, CA 95816	\$1,000,001 - \$5,000,000	RENT	\$50,001 - \$100,000	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	American Century (IRA) Vista	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	
SP	Ameriprise (IRA) International Fund	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	
SP	Bank of America	\$15,001 - \$50,000	INTEREST	\$201 - \$1,000	
SP	Charles Schwab Amerco Stock	\$1 - \$1,000	NONE	NONE	
SP	Charles Schwab Anglogold Ashanti LT Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Clarus Corp Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Clarus Corp. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Daytonabrand's Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Discovery Holding Co. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab DWS Emerging Market Mutual Fund	\$15,001 - \$50,000	DIVIDENDS	\$2,501 - \$5,000	
SP	Charles Schwab First Medical Group Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Graham-Field Hlth. PR Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Healthsport Inc. Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Liberty Media Interactive Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Charles Schwab Mphase Technologies, Inc. Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Schwab Muni Money Market	\$250,001 - \$500,000	DIVIDENDS	\$15,001 - \$50,000	
SP	Charles Schwab Schwab Value Money Market	\$250,001 - \$500,000	DIVIDENDS	\$1,001 - \$2,500	
SP	Charles Schwab Star Scientific Inc. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Trimedyn, Inc. Stock	\$1 - \$1,000	DIVIDENDS	\$201 - \$1,000	
SP	Charles Schwab Zap. Com Corp Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Charles Schwab Zapata Corp. Stock	\$1 - \$1,000	DIVIDENDS	\$201 - \$1,000	
	Charles Schwab (IRA) Cisco Systems, Inc. Stock	\$1,001 - \$15,000	NONE	NONE	
SP	Charles Schwab (IRA) Genentech, Inc. Stock	\$15,001 - \$50,000	NONE	NONE	
	Charles Schwab (IRA) Hewlett-Packard Company Stock	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
	Charles Schwab (IRA) Hewlett-Packard Company Stock	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	
	Charles Schwab (IRA) Schwab Money Market Fund	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
SP	Charles Schwab (Strategic) Progressive Corp. Ohio Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Charles Schwab (Strategic) Schwab Money Market Fund	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	
SP	Charles Schwab (Strategic) Dell Inc. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
DC	Charles Schwab (Trust) Advanced Micro Devices Stock	\$1,001 - \$15,000	NONE	NONE	
DC	Charles Schwab (Trust) Alcatel Lucent ADR Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
DC	Charles Schwab (Trust) Align Technology, Inc. Stock	\$1,001 - \$15,000	NONE	NONE	
DC	Charles Schwab (Trust) Citadel Broadcasting Stock	\$1 - \$1,000	NONE	NONE	
DC	Charles Schwab (Trust) Disney Walt Co. Stock	\$15,001 - \$50,000	NONE	NONE	
DC	Charles Schwab (Trust) Meadwestvao Corp. Stock	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
DC	Charles Schwab (Trust) Microsoft Corp. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
DC	Charles Schwab (Trust) Pac-West Telecomm, Inc. Stock	\$1 - \$1,000	NONE	NONE	
DC	Charles Schwab (Trust) Schwab Money Market Fund	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	
DC	Charles Schwab (Trust) The Charles Schwab Corp. Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
DC	Charles Schwab (Trust) Comcast Corp Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
DC	Charles Schwab (Trust) McKesson Corp. Stock	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Citibank Stock	\$1,001 - \$15,000	NONE	NONE	
	City Morgan Stanley AOL Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	City Morgan Stanley Electronic Arts Stock	\$15,001 - \$50,000	NONE	NONE	
	City National Bank Account	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
DC	City National Bank Accounts	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
DC	Fidelity - EDU IRA CA 100% Equity (Index) Fund	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	
DC	Fidelity-EDU IRA CA Guaranteed Option Fund	\$50,001 - \$100,000	DIVIDENDS	\$1,001 - \$2,500	
SP	Gabelli Asset Fund	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$1 - \$200	
SP	Gabelli Small Capitol Growth Fund	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	
SP	GE Stock	\$1,001 - \$15,000	NONE	NONE	
SP	Med America 401(k) - Retirement	\$150,000 - \$250,000	DIVIDENDS/CAPITAL GAINS	\$5,001 - \$15,000	
	Nuveen California Ins Muni A Fund	\$15,001 - \$50,000	INTEREST	\$1,001 - \$2,500	
DC	PG&E Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	Safelife Stock Option Medical Mask San Diego, CA	\$1,001 - \$15,000	NONE	NONE	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	Savings Plus (401k) Short-term Investment Fund	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$5,001 - \$15,000	
	Savings Plus 401(k) Large Cap Fund	\$50,001 - \$100,000	DIVIDENDS/CAPITAL GAIN/	\$5,001 - \$15,000	
	Savings Plus 401(k) International Fund	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$5,001 - \$15,000	
SP	Schwab - Microsoft Stock	\$15,001 - \$50,000	NONE	NONE	
SP	Schwab INTEL Stock	\$15,001 - \$50,000	NONE	NONE	
SP	Schwab Seraph Parturus II Stock	\$15,001 - \$50,000	DIVIDENDS	NONE	
DC	Sterling Bank	\$100,001 - \$250,000	INTEREST	\$201 - \$1,000	
	Sterling Bank	\$50,001 - \$100,000	INTEREST	\$201 - \$1,000	
DC	Sterling Bank - Speier Family Partnership	\$50,001 - \$100,000	INTEREST	\$201 - \$1,000	
SP	Strategic Investment Solutions Stock CA Investment Management	\$1,000,001 - \$5,000,000	NONE	NONE	
	U.S. Bank - Speier Family Partners	\$50,001 - \$100,000	INTEREST	\$1 - \$200	
SP	US Bank Accounts	\$15,001 - \$50,000	INTEREST	\$201 - \$1,000	
SP	Vanguard (IRA) Federal Money Market Fund	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$1 - \$200	
SP	Vanguard (IRA) International Growth Adm Fund	\$100,001 - \$250,000	DIVIDENDS/CAPITAL GAINS	\$15,001 - \$50,000	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Vanguard (IRA) Windsor II Fund Adm	\$100,001 - \$250,000	DIVIDENDS/CAP TAL GAINS	\$15,001 - \$50,000
SP	Vanguard (IRA) Explorer Fund Admiral	\$100,001 - \$250,000	DIVIDENDS/CAP TAL GAINS	\$15,001 - \$50,000
SP	Vanguard (IRA) Growth Equity Fund	\$100,001 - \$250,000	DIVIDENDS/CAP TAL GAINS	\$15,001 - \$50,000
SP	Vanguard (IRA) International Value Fund	\$100,001 - \$250,000	DIVIDENDS/CAP TAL GAINS	\$15,001 - \$50,000

SCHEDULE IV - TRANSACTIONS

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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 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.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
DC	General Electric Conglomerate Mfg.	P	2009	\$1,001 - \$15,000
DC	Hewlett Packard	S	2009	\$1,001 - \$15,000
DC	Align Technology Dental Supplies	S	2/23/09	\$1,001 - \$15,000
	Hewlett Packard Computer/Printer Mfg.	S	2/23/09	\$1,001 - \$15,000
	General Electric Conglomerate Mfg.	P	1/23/2009	\$1,001 - \$15,000
	Ford Motor Auto Manufacturer	P	11/09/09	\$1,001 - \$15,000
SP	GE Stock	S	2009	\$1,001 - \$15,000
SP	Charles Schwab Progressive Corp. Ohio Stock	S	2009	\$1,001 - \$15,000
SP	Citibank Stock	S	2009	\$1,001 - \$15,000

SCHEDULE V - LIABILITIES

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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 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.

SP, DC, JT	Creditor	Type of Liability	Amount of Liability
	American River Bank	Mortgage on 730 Alhambra, Sacramento, CA	\$500,001 - \$1,000,000

SCHEDULE VII - TRAVEL PAYMENTS AND REIMBURSEMENTS

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Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$335 received by you, your spouse, or a dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense, and the amount of time, if any, that was not at the sponsor's expense. Disclosure is required regardless of whether the expenses were reimbursed or paid directly by the sponsor. Exclude: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to you.

Source	Date(s)	Point of Departure-- Destination--Point of Return	Lodging? (Y/N)	Food? (Y/N)	Was a Family Member Included? (Y/N)	Days not at sponsor's expense
AAUW - American Association of University Women	June 27 - 28, 2010	DC - St. Louis - Marquette, WI	Y	Y	N	None

SCHEDULE VIII - POSITIONS

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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.

Position	Name of Organization
Board Director	Philanthropic Ventures Foundation (PVF) 1222 Preservation Park Way Oakland, CA 94612-1201

SCHEDULE IX - AGREEMENTS

Name K. Jacqueline Speier

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Identify the date, parties to, and general terms of any agreement or arrangement with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. Government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties To	Terms of Agreement
2006	Red Wheel/Mesier/Conari, 65 Parker Street, Suite 7, Newburyport, MD 01950	Book