

# UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2012 FINANCIAL DISCLOSURE STATEMENT

**FORM A** Page 1 of 12  
For use by Members, officers, and employees

**HAND DELIVERED**

David Daniel Boren  
(Full Name)

(Daytime Telephone)

2013 APR 30 PM 3:32  
(Office Use Only)

LEGISLATIVE RESOURCE CENTER

<b>Filer Status</b>	<input checked="" type="checkbox"/> Member of the U.S. House of Representative State: OK District: 2	<input type="checkbox"/> Officer Or Employee Employing Office:	Termination Date: 1/22/2013
<b>Report Type</b>	<input type="checkbox"/> Annual (May 15) <input type="checkbox"/> Amendment	<input checked="" type="checkbox"/> Termination	

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 \$350 and not otherwise exempt)? If yes, complete and attach Schedule VI.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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? If yes, complete and attach Schedule II.	Yes <input type="checkbox"/> No <input checked="" 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 \$350 from one source)? If yes, complete and attach Schedule VII.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
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? If yes, complete and attach Schedule III.	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? If yes, complete and attach Schedule VIII.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
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? If yes, complete and attach Schedule IV.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule IX.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period? If yes, complete and attach Schedule V.	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.	

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

IPO-- Did you purchase any shares that were allocated as a part of an Initial Public Offering?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 <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 Ethics.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

**SCHEDULE I - EARNED INCOME**

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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
Muskogee Women's Clinic	Spouse Self-Employment Income	N/A

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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BLOCK A Asset and/or Income Source		BLOCK B Year-End Value of Asset	BLOCK C Type of Income	BLOCK D Amount of Income	BLOCK E 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 reportable asset or sources of income which generated more than \$200 in "unearned" income during the year.</p> <p>Provide complete names of stocks and mutual funds (do not use ticker symbols.)</p> <p>For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that exceeds the reporting thresholds.</p> <p>For rental or other real property held for investment, provide a complete address or a description, e.g., "rental property," and a city and state.</p> <p>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 location in Block A.</p> <p>Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); any deposits totaling \$5,000 or less in a personal checking or saving accounts; and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.</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 with your spouse (JT), in the optional column on the far left.</p> <p>For a detailed discussion of Schedule III requirements, please refer to the instruction booklet.</p>		<p>Indicate value of asset at close of reporting year. If you use a valuation method other than fair market value, please specify the method used.</p> <p>If an asset was sold during the reporting year and is included only because it generated income, the value should be "None."</p> <p>* This column is for assets held solely by your spouse or dependent child.</p>	<p>Check all columns that apply. For retirement accounts that do not allow you to choose specific investments or that generate tax-deferred income (such as 401(k) plans or IRAs), you may check the "None" column. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income. Check "None" if the asset generated no income during the reporting period.</p>	<p>For assets for which you checked "Tax-Deferred" in Block C, you may check the "None" column. For all other assets, indicate the category of income by checking the appropriate box below. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income. Check "None" if no income was earned or generated.</p> <p>* This column is for income generated by assets held solely by your spouse or dependent child.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
	American Bank of Oklahoma certificate of deposit	\$15,001 - \$50,000	INTEREST	\$201 - \$1,000	
SP	Artio International Equity Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Artisan International Small Cap Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
DC1	AT&T, Inc stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
	Ava O Limited Co, minerals Madill, OK (7.69% interest)	\$100,001 - \$250,000	Other: partnership income	\$15,001 - \$50,000	
JT	BancFirst Checking Account	\$1,001 - \$15,000	INTEREST	\$1 - \$200	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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JT	Boren Ranch, LLC - Citizens Security Bank checking account	\$15,001 - \$50,000	None	NONE	
JT	Boren Ranch, LLC - note receivable from Homer Morse	\$100,001 - \$250,000	INTEREST	\$5,001 - \$15,000	
JT	Boren Ranch, LLC - Pittsburg County, OK	\$500,001 - \$1,000,000	Other: hunting lease	\$2,501 - \$5,000	
	Chinn Exploration Co.	\$1 - \$1,000	Other: royalties	\$1 - \$200	
	DWS Global Income Builder (2012 name change from DWS Balanced Fund) (held in IRA)	\$15,001 - \$50,000	Other: tax deferred	NONE	
	Facebook, Inc stock	\$1,001 - \$15,000	None	NONE	P
	First National Bank of Wewoka checking account	\$100,001 - \$250,000	INTEREST	\$201 - \$1,000	
	First National Bank of Wewoka checking account	\$15,001 - \$50,000	INTEREST	\$1 - \$200	
DC2	First United Bank/LLP checking account	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
	First United Bank/LLP checking account (tax account)	\$15,001 - \$50,000	INTEREST	\$1 - \$200	
DC1	Invesco Van Kampen Equity and Income Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	LLCO-(Little Land Company, LP), investment, Madill, OK (5.71% interest, individual holdings follow)	\$250,001 - \$500,000	Other: partnership income	\$50,001 - \$100,000	
	LLCO-California State Water Resources Development bonds	None	INTEREST	\$1 - \$200	S

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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LLCO-Federated Government Reserves money market fund (account closed March 2012)	None	None	NONE	
LLCO-First United Bank account	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
LLCO-Home Depot, Inc stock	None	None	NONE	S
LLCO-Interest in Courage Credit Opportunities Fund II, LP, investment, Nashville, TN	\$1,001 - \$15,000	Other: partnership income	\$201 - \$1,000	P
LLCO-Interest in Courage Special Situation Fund, LP, investment, Nashville, TN	\$100,001 - \$250,000	Other: partnership income	NONE	
LLCO-Interest in Red River Pine Limited Co, timber, Madill, OK	\$1,001 - \$15,000	Other: partnership income	\$201 - \$1,000	
LLCO-Interest in Suburban Propane Partners, LP, energy marketing and distribution, Whippany, NJ	None	Other: partnership income/CAPITAL GAINS	\$2,501 - \$5,000	S
LLCO-JP Morgan Chase & Co stock	None	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	S
LLCO-Landmark Bank Account	\$15,001 - \$50,000	INTEREST	\$1 - \$200	
LLCO-mineral rights, Oklahoma	\$50,001 - \$100,000	Other: royalties	\$50,001 - \$100,000	
LLCO-note receivable from Red River Pine Limited Co	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
LLCO-OGE Energy Corp stock	None	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	S

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	LLCO-Oklahoma State Turnpike Authority bond	None	INTEREST/CAPITAL GAINS	\$201 - \$1,000	S
	LLCO-real estate (cabin), Kingston, OK	\$1,001 - \$15,000	None	NONE	
	LLCO-real estate (vacant land), Oklahoma	\$1,001 - \$15,000	None	NONE	
	LLCO-Wal-Mart Stores, Inc stock	None	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	S
DC1	McDonald's Corporation stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
DC2	McDonald's Corporation stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
	MFS Growth Fund (held in IRA)	\$1,001 - \$15,000	Other: tax deferred	NONE	
	Oteka Little Estate (in probate, 1/6th interest)	\$50,001 - \$100,000	Other: estate distributions	\$100,001 - \$1,000,000	
	Red River Pine Limited Co, timber, Madill, OK (7.41% interest)	\$50,001 - \$100,000	Other: partnership income	\$2,501 - \$5,000	
SP	Schwab 1000 Index Fund (held in IRA)	\$1,001 - \$15,000	Other: tax deferred	NONE	
SP	Turner Emerging Growth Micro Cap Growth Fund (held in IRA)	\$1,001 - \$15,000	Other: tax deferred	NONE	
DC1	Walt Disney Co.	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
SP	Wishire Funds Dow Jones Wishire 5000 Index Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

# SCHEDULE IV - TRANSACTIONS

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Report any purchase, sale, or exchange transactions by you, your spouse, or dependent child during the reporting period of any security or real property held for investment that exceeded \$1,000. Include transactions that resulted in a capital loss. Provide a brief description of any exchange transaction. Exclude transactions between you, your spouse or dependent children, or the purchase or sale of your personal residence, unless it generates rental income. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

Capital Gains — if a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box and disclose this income on Schedule III.

\* This column is for assets solely held by your spouse or dependent child.

SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
DC1	AT&T, Inc stock (gift from family member)	P	N/A	9-13-12	\$1,001 - \$15,000
	Facebook, Inc stock	P	N/A	5-18-12 5-21-12	\$1,001 - \$15,000
	LLCO-California State Water Resources Development bonds	S	No	2-29-12	\$1,001 - \$15,000
	LLCO-Home Depot, Inc. stock	S	No	2-28-12	\$1,001 - \$15,000
	LLCO-Interest in Courage Credit Opportunities Fund II, LP, investment, Nashville, TN	P	N/A	1-25-12 5-24-12	\$1,001 - \$15,000
	LLCO-Interest in Suburban Propane Partners, LP, energy marketing and distribution, Whippany, NJ	S	Yes	2-28-12	\$1,001 - \$15,000
	LLCO-JP Morgan Chase & Co stock	S	Yes	2-28-12	\$1,001 - \$15,000
	LLCO-OGE Energy Corp stock	S	Yes	2-28-12	\$1,001 - \$15,000
	LLCO-Oklahoma State Turnpike Authority bond	S	Yes	2-29-12	\$1,001 - \$15,000
	LLCO-Wal-Mart Stores, Inc stock	S	Yes	2-28-12	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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Report any purchase, sale, or exchange transactions by you, your spouse, or dependent child during the reporting period of any security or real property held for investment that exceeded \$1,000. Include transactions that resulted in a capital loss. Provide a brief description of any exchange transaction. Exclude transactions between you, your spouse or dependent children, or the purchase or sale of your personal residence, unless it generates rental income. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

Capital Gains — If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box and disclose this income on Schedule III.

\* This column is for assets solely held by your spouse or dependent child.

SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
DC1	McDonald's Corporation stock	P	N/A	11-9-12	\$1,001 - \$15,000
DC2	McDonald's Corporation stock	P	N/A	11-9-12	\$1,001 - \$15,000
DC1	Walt Disney Co. (gift from family member)	P	N/A	9-13-12	\$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. Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless it is rented out or you are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); 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. \*This column is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred	Type of Liability	Amount of Liability
JT	First United Bank - Durant, OK	March 2008, refinanced October 2012	Mortgage on personal residence, Muskogee, OK	\$100,001 - \$250,000
JT	First United Bank - Durant, OK	June 2009	Loan on Boren Ranch, LLC land, Pittsburg County, OK	\$100,001 - \$250,000
JT	First United Bank - Durant, OK	August 2010	Fence and equipment loan/line of credit for Boren Ranch, LLC, Pittsburg County, OK	\$15,001 - \$50,000

**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 \$350 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
Fu Jen Catholic University - Taiwan	Feb. 18-25	Tulsa, OK-Taipei, Taiwan-DC	Y	Y	Y	None
National Rifle Association	April 14-16	Tulsa, OK-St. Louis, MO	Y	Y	N	None

# SCHEDULE VIII - POSITIONS

Name David Daniel Boren

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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
Managing Partner	Boren Ranch, LLC - Muskogee, OK
Limited Partner	Ava O Limited Co - Madill, OK
Limited Partner	Little Land Company, LP - Madill, OK
Limited Partner	Red River Pine Limited Co - Madill, OK
Member of Board	Jasmine Moran Children's Museum - Seminole, OK
Member of Board	National Rifle Association of America - Fairfax, VA
Member of Board	Joe Foss Institute - Scottsdale, AZ
Member of Board	FATE (Fighting Addiction Through Education), Inc. - Oklahoma City, OK
Member of Board	Seminole State College Educational Foundation - Seminole, OK (joined January 2013)
Member of Board	Oklahoma Children's Hospital Foundation - Oklahoma City, OK (joined January 2013)
Member of Board	EXSO Bionics - Richmond, CA (joined April 2013)

# SCHEDULE IX - AGREEMENTS

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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
1/7/2013	The Chickasaw Nation - Norman, OK	Hired as President of Corporate Development