

UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2011 FINANCIAL DISCLOSURE STATEMENT

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LEGISLATIVE RESOURCE CENTER
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John Walter Oliver

202-225-5335

U.S. HOUSE OF REPRESENTATIVES

(Full Name)

(Daytime Telephone)

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Filer Status	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: <u>MA</u> District: <u>01</u>	<input type="checkbox"/> Officer Or Employee	Employing Office:
Report Type	<input checked="" type="checkbox"/> Annual (May 15)	<input type="checkbox"/> Amendment	<input type="checkbox"/> 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 \$350 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 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)?	Yes <input type="checkbox"/> No <input checked="" 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 type="checkbox"/> No <input checked="" 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 type="checkbox"/> No <input checked="" 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 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
Amherst College - Amherst, MA	Spouse Salary	N/A
Commonwealth of Massachusetts ("NOTE: This Schedule I "earned" income has been disclosed in previous years, on an ongoing basis, as Schedule III "unearned" income. Switched this year to Schedule I.)	State Employee Pension	\$25,000

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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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 reportable asset or source 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) 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 for each asset held in the account that exceeds the reporting thresholds. For retirement accounts which are not self-directed, provide only the name of the institution holding the account and its value at the end of the reporting period.</p> <p>For rental or other real property held for investment, provide a complete address.</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>At close of reporting year.</p> <p>If you use a valuation method other than fair market value, please specify the method used.</p> <p>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.</p> <p>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 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. For all other assets, indicate the category of income by checking the appropriate box below.</p> <p>Dividends, interest, and capital gains, even if reinvested, must be disclosed 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>
JT	120 acres of unimproved land at 117 Central Street, Plainfield, MA	\$100,001 - \$250,000	None	NONE	
JT	25 acres of unimproved land at Beachlake, Berlin Township, PA	\$100,001 - \$250,000	None	NONE	
JT	27 acres of unimproved land on Buffam Road, Pelham, MA	\$100,001 - \$250,000	None	NONE	
JT	33 Myrtle Street, Boston, MA	\$100,001 - \$250,000	RENT	\$5,001 - \$15,000	
JT	45 acres of unimproved land on North Valley Road, Pelham, MA	\$50,001 - \$100,000	None	NONE	
JT	AMCAP mutual fund	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Bank of America interest-bearing checking account (SP)	\$15,001 - \$50,000	INTEREST	\$1 - \$200	
JT	Bank of America interest-bearing checking account (JT)	\$15,001 - \$50,000	INTEREST	\$1 - \$200	
SP	Columbia Contrarian Core Fund T	\$15,001 - \$50,000	INTEREST	\$201 - \$1,000	
SP	DWS World Dividend Fund A	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	
JT	Hewlett-Packard Company stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Monsanto Co. stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Pfizer, Inc. stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
JT	Powershares Exchange Traded Fund - Clean Energy	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$1 - \$200	
JT	Powershares Exchange Traded Fund - Water Resources	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$1 - \$200	
	TD Banknorth CD	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
JT	Telefonica, S.A. (ADR) stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	Texas Instruments, Inc. stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
JT	Winslow Green Growth Fund	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$1 - \$200	P
SP	z1 order reference:: TIAA-CREF Traditional Retirement Annuity	\$250,001 - \$500,000	TAX-DEFERRED	NONE	P, S, Re-purchase

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	z2 order reference:: TIAA-CREF Social Choice Equity Fund - Retirement Class	None	TAX-DEFERRED	NONE	P, S (part), then S
SP	z3 order reference:: TIAA-CREF Mid-Cap Value Equity Fund - Retirement Class	None	TAX-DEFERRED	NONE	P, S (part), then S
SP	z4 order reference:: TIAA-CREF Large-Cap Value Index Equity Fund - Retirement Class	None	TAX-DEFERRED	NONE	P, S (part), then S
SP	z5 order reference:: TIAA-CREF International Equity Index Fund - Retirement Class	None	TAX-DEFERRED	NONE	P, S (part), then S
SP	z6 order reference:: TIAA-CREF Social Choice Equity Fund - Institutional Class	\$250,001 - \$500,000	TAX-DEFERRED	NONE	P
SP	z7 order reference:: TIAA-CREF Mid-Cap Value Equity Fund - Institutional Class	\$100,001 - \$250,000	TAX-DEFERRED	NONE	P
SP	z8 order reference:: TIAA-CREF International Equity Index Fund - Institutional Class	\$50,001 - \$100,000	TAX-DEFERRED	NONE	P
SP	z9 order reference:: TIAA-CREF Large-Cap Value Index Equity Fund - Institutional Class	\$50,001 - \$100,000	TAX-DEFERRED	NONE	P
SP	z91 order reference:: TIAA-CREF TIAA Real Estate Variable Annuity Account	\$100,001 - \$250,000	TAX-DEFERRED	NONE	P, S, Re-purchase
SP	z92 order reference:: TIAA-CREF CREF Bond Market	\$500,001 - \$1,000,000	TAX-DEFERRED	NONE	P, S, Re-purchase
SP	z93 order reference:: TIAA-CREF CREF Inflation-Linked Bond Annuity Account	\$100,001 - \$250,000	TAX-DEFERRED	NONE	P, S (part), S, Re-purchase

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	z94 order reference:: TIAA-CREF PIMCO Total Return Fund - Institutional Class	\$1,001 - \$15,000	TAX-DEFERRED	NONE	P
SP	z95 order reference:: TIAA-CREF CREF Social Choice Variable Annuity Account (multi-asset)	\$100,001 - \$250,000	TAX-DEFERRED	NONE	P, S, Re-purchase
SP	z96 order reference:: TIAA-CREF Money Market Fund - Retirement Class	None	TAX-DEFERRED	NONE	S

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	Capital Gain in Excess of \$200?	Date	Amount of Transaction
JT	Winslow Green Growth Fund	P	N/A	05-05-11	\$1,001 - \$15,000
SP	z1A order reference:: TIAA-CREF Traditional Retirement Annuity	P	N/A	Monthly	\$1,001 - \$15,000
SP	z1B order reference:: TIAA-CREF Traditional Retirement Annuity	S	No	12-05-11	\$250,001 - \$500,000
SP	z1C order reference:: TIAA-CREF Traditional Retirement Annuity	P	N/A	12-05-11	\$250,001 - \$500,000
SP	z2A order reference:: TIAA-CREF Social Choice Equity Fund - Retirement Class	P	N/A	Monthly, Jan. - Nov.	\$1,001 - \$15,000
SP	z2B order reference:: TIAA-CREF Social Choice Equity Fund - Retirement Class	S(part)	No	05-24-11	\$100,001 - \$250,000
SP	z2C order reference:: TIAA-CREF Social Choice Equity Fund - Retirement Class	S	No	12-02-11	\$250,001 - \$500,000
SP	z3A order reference:: TIAA-CREF Mid-Cap Value Equity Fund - Retirement Class	P	N/A	Monthly, Jan. - Nov.	\$1,001 - \$15,000
SP	z3B order reference:: TIAA-CREF Mid-Cap Value Equity Fund - Retirement Class	S(part)	No	05-24-11	\$15,001 - \$50,000
SP	z3C order reference:: TIAA-CREF Mid-Cap Value Equity Fund - Retirement Class	S	No	12-02-11	\$100,001 - \$250,000
SP	z4A order reference:: TIAA-CREF Large-Cap Value Index Equity Fund - Retirement Class	P	N/A	05-24-11	\$50,001 - \$100,000

SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
SP	z4B order reference:: TIAA-CREF Large-Cap Value Index Fund - Retirement Class (*NOTE: This purchase below reporting threshold; listed here only for future tracking purposes)	P	N/A	Monthly, June - Nov.	(Below \$1,001 threshold)
SP	z4C order reference:: TIAA-CREF Large-Cap Value Index Fund - Retirement Class	S	No	12-02-11	\$50,001 - \$100,000
SP	z5A order reference:: TIAA-CREF International Equity Index Fund - Retirement Class	P	N/A	Monthly, Jan. - Nov.	\$1,001 - \$15,000
SP	z5B order reference:: TIAA-CREF International Equity Index Fund - Retirement Class	S(part)	No	05-24-11	\$50,001 - \$100,000
SP	z5C order reference:: TIAA-CREF International Equity Index Fund - Retirement Class	S	No	12-02-11	\$50,001 - \$100,000
SP	z6 order reference:: TIAA-CREF Social Choice Equity Fund - Institutional Class	P	N/A	12-02-11	\$250,001 - \$500,000
SP	z7 order reference:: TIAA-CREF Mid-Cap Value Equity Fund - Institutional Class	P	N/A	12-02-11	\$100,001 - \$250,000
SP	z8 order reference:: TIAA-CREF International Equity Index Fund - Institutional Class	P	N/A	12-02-11	\$50,001 - \$100,000
SP	z9 order reference:: TIAA-CREF Large-Cap Value Index Index Fund - Institutional Class	P	N/A	12-02-11	\$50,001 - \$100,000
SP	z91A order reference:: TIAA-CREF Real Estate Variable Annuity Account	P	N/A	Monthly, Jan - Nov.	\$1,001 - \$15,000

SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
SP	z91B order reference:: TIAA-CREF Real Estate Variable Annuity Account	S	No	12-05-11	\$100,001 - \$250,000
SP	z91C order reference:: TIAA-CREF Real Estate Variable Annuity Account	P	N/A	12-05-11	\$100,001 - \$250,000
SP	z92A order reference:: TIAA-CREF CREF Bond Market	P	N/A	Monthly, Jan. - Nov.	\$1,001 - \$15,000
SP	z92B order reference:: TIAA-CREF CREF Bond Market	P	N/A	05-24-11	\$100,001 - \$250,000
SP	z92C order reference:: TIAA-CREF CREF Bond Market	S	No	12-05-11	\$500,001 - \$1,000,000
SP	z92D order reference:: TIAA-CREF CREF Bond Market	P	N/A	12-05-11	\$500,001 - \$1,000,000
SP	z93A order reference:: TIAA-CREF CREF Inflation-Linked Bond Annuity Account	P	N/A	Monthly, Jan. - Nov.	\$1,001 - \$15,000
SP	z93B order reference:: TIAA-CREF CREF Inflation-Linked Bond Annuity Account	S(part)	No	05-24-11	\$100,001 - \$250,000
SP	z93C order reference:: TIAA-CREF CREF Inflation-Linked Bond Annuity Account	S	No	12-05-11	\$100,001 - \$250,000
SP	z93D order reference:: TIAA-CREF CREF Inflation-Linked Bond Annuity Account	P	N/A	12-05-11	\$100,001 - \$250,000
SP	z94 order reference:: TIAA-CREF PIMCO Total Return Fund - Institutional Class	P	N/A	12-30-11	\$1,001 - \$15,000

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	Capital Gain in Excess of \$200?	Date	Amount of Transaction
SP	Z95A order reference:: TIAA-CREF CREF Social Choice Variable Annuity Account (multi- asset)	P	N/A	05-24-11	\$100,001 - \$250,000
SP	Z95B order reference:: TIAA-CREF CREF Social Choice Variable Annuity Account (multi- asset)	P	N/A	Monthly, May - Nov.	\$1,001 - \$15,000
SP	Z95C order reference:: TIAA-CREF CREF Social Choice Variable Annuity Account (multi- asset)	S	No	12-05-11	\$100,001 - \$250,000
SP	Z95D order reference:: TIAA-CREF CREF Social Choice Variable Annuity Account (multi- asset)	P	N/A	12-05-11	\$100,001 - \$250,000
SP	Z96 order reference:: TIAA-CREF Money Market Fund - Retirement Class	S	No	05-24-11	\$100,001 - \$250,000

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
06-14-91	Massachusetts State Employee Life Insurance Program	Continuing benefits as a former employee
06-14-91	Massachusetts State Employee Retirement Program	Retirement effective November 20, 1992