

UNITED STATES HOUSE OF REPRESENTATIVES FINANCIAL DISCLOSURE STATEMENT FOR CALENDAR YEAR 2007

FORM A
For use by Members, officers, and employees

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Tom Udall
(Full Name)

202-225-6190
(Daytime Telephone)

U.S. House of Representatives (Office Use Only)

2008 MAY 15 PM 4:35

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Filer
Status

☒ Member of the U.S.
House of Representatives

State: NM
District: 3

☐ Officer Or
Employee

Employing Office:

Report
Type

☒ Annual (May 15)

☐ 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 \$305 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 \$305 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 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 type="checkbox"/> No <input checked="" 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 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?	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
Smithsonian Institution	Spouse Salary	N/A

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 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. Check "None" if asset did not generate any income during the calendar year. If other than one of the listed categories, specify the type of income by writing a brief description in this block. (For example: Partnership income or Farm Income)</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, indicate the category of income by checking the appropriate box below. Dividends, even if reinvested, should be listed as income. Check "None" if no income was earned.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
Albuquerque NM Gross Receipts (bond)	\$15,001 - \$50,000	INTEREST	\$1,001 - \$2,500	
Alliance Bernstein International Growth	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$1 - \$200	
Boston Capital	\$1,001 - \$15,000	tax credit	\$201 - \$1,000	
California State (bond)	\$15,001 - \$50,000	INTEREST	\$1,001 - \$2,500	
Capital Income Builder	\$50,001 - \$100,000	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	P
CBS	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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Davis New York Venture	\$100,001 - \$250,000	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	P
Europacific Growth	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	
Evergreen International Bond	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	S(part)
Evergreen International Equity	\$100,001 - \$250,000	DIVIDENDS/CAPITAL GAINS	\$2,501 - \$5,000	P
Evergreen Precious Metals	\$15,001 - \$50,000	None	NONE	
Evergreen Strategic Municipal Bond	\$50,001 - \$100,000	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	P
Growth Fund of America	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	
Inland Western Retail Real Estate	\$50,001 - \$100,000	DIVIDENDS	\$2,501 - \$5,000	P
Investment Company of America	\$50,001 - \$100,000	DIVIDENDS/CAPITAL GAINS	\$2,501 - \$5,000	PS(part)
Kensington Strategic Realty	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	P
Liberty Composite Fund	\$50,001 - \$100,000	None	NONE	
Medco Health	\$1,001 - \$15,000	None	NONE	
Merck	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
New Mexico Finance Authority Court Facs (bond)	\$1,001 - \$15,000	INTEREST	\$201 - \$1,000	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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New Mexico Finance Authority Trans (bond)	\$15,001 - \$50,000	INTEREST	\$1,001 - \$2,500	
New Perspective	\$50,001 - \$100,000	DIVIDENDS/CAPITAL GAINS	\$5,001 - \$15,000	P
NM Public Employees Retirement	\$50,001 - \$100,000	None	NONE	
Northwest Mutual	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	P
Pacific Select Variable Annuity	\$100,001 - \$250,000	None	NONE	
Pacific Value Variable Annuity	\$500,001 - \$1,000,000	None	NONE	
Pershing Money Market	\$15,001 - \$50,000	INTEREST	\$1,001 - \$2,500	S(part)
Prologis	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	P
Puerto Rico Commonwealth Bond	\$15,001 - \$50,000	INTEREST	\$1,001 - \$2,500	
Small Cap World Fund	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	
Transamerica Landmark VA	\$100,001 - \$250,000	None	NONE	
Truststreet Property	None	None	NONE	S
Washington Mutual Investors	\$50,001 - \$100,000	DIVIDENDS/CAPITAL GAINS	\$2,501 - \$5,000	P
Wells Real Estate Fund VII (Wells Limited Partnership)	\$1,001 - \$15,000	distributions	\$201 - \$1,000	

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 or series of transactions exceeded \$1,000. Include transactions that resulted in a loss. 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. Provide a brief

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	Capital Income Builder	P	quarterly	\$1,001 - \$15,000
	Davis New York Venture	P	quarterly	\$1,001 - \$15,000
	Evergreen International Bond	S(part)	9-5-07	\$15,001 - \$50,000
	Evergreen International Equity	P	quarterly	\$1,001 - \$15,000
	Evergreen Strategic Municipal Bond	P	quarterly	\$1,001 - \$15,000
	Inland Western Retail Real Estate	P	quarterly	\$1,001 - \$15,000
	Investment Company of America	PS(part)	partial sale 6-6-07/purchases quarterly	\$1,001 - \$15,000
	Kensington Strategic Realty	P	quarterly	\$1,001 - \$15,000
	New Perspective	P	quarterly	\$1,001 - \$15,000
	Northwest Mutual	P	quarterly	\$1,001 - \$15,000
	Pershing Money Market	S(part)	4-26; 7-3; 8-6; 9-12 ; 10-2; 10-4; 10-15 ; 10-31; 12-17	\$50,001 - \$100,000

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 or series of transactions exceeded \$1,000. Include transactions that resulted in a loss. 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. Provide a brief

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	Prologis	P	quarterly	\$1,001 - \$15,000
	Truststreet Property	S	2-27-07	\$1,001 - \$15,000
	Washington Mutual Investors	P	quarterly	\$1,001 - \$15,000

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 \$305 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
Aspen Institute	Mar. 31 - Apr. 8	Washington, DC - Shanghai, China - Nanjing, China - Beijing, China - Albuquerque, NM	Y	Y	Y	none