



Filing ID #10005789

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Sander M. Levin
Status: Member
State/District: MI09

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2014
Filing Date: 05/15/2015

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
1/2 interest in 78 acres		\$142,400	None		<input type="checkbox"/>
LOCATION: Tyrone Township, Livingston County, MI, US					
1/6 interest in 18 acres		\$12,766	None		<input type="checkbox"/>
LOCATION: Tyrone Township, Livingston County, MI, US					
1/9 undivided interest in Levinson-Levin Properties, L.L.C., commercial real estate, West Maple		\$124,162	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Birmingham, MI, US					
1/9 undivided interest in Levinson-Levin Properties, L.L.C., commercial real estate, West Maple		\$66,647	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Birmingham, MI, US					
5.3% interest in Michigan mineral rights previously held by LNS Co., a general partnership now liqui		\$15,001 - \$50,000	Royalties	\$8,279.17	<input type="checkbox"/>
DESCRIPTION: Muskegon Development Co., an assignee from previous lease - \$82.01; Breitburn Operating LP - income - \$1,314.49; Merit Energy Co. - income - \$3,254.84; Linn Operating Inc., - income - \$3,784.24. The year-end value of these interests are estimated herein based on latest available information and technical advice.					
Apple Bank for Savings	SP	\$43,271.19	Interest	\$43.94	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Congressional Federal Credit Union		\$17,335	None		<input type="checkbox"/>
House, Lot 4, West Tisbury, Mass. (subject to Quicken Loan Mortgage)		\$1,171,300	Rent	\$22,150	<input type="checkbox"/>
LOCATION: West Tisbury, MA, US					
IRA ⇒ First National Bank Certificate of Deposit	SP	\$13,914.93	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ First National Bank Certificate of Deposit	SP	\$7,883.15	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Security Benefit: Variflex Qualified Variable Annuity	SP	\$45,540	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Univ. of Houston Texas Optional Retirement Program: TIAA Traditional	SP	\$116,296.72	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Bond Fund of America CL C		\$93,871.68	Dividends	\$820.69	<input checked="" type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Capital Income Builders CL C		\$113,237.37	Capital Gains, Dividends	\$7,966.96	<input checked="" type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Income Fund of America CL C		\$122,640.98	Capital Gains, Dividends	\$8,246.62	<input checked="" type="checkbox"/>
Merrill Lynch IRA ⇒ American Bond Fund of America CL C		\$1,498.77	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ American Capital Income Builder CL C		\$20,274.2	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ American Capital Income Builder CL F1		\$18,770.85	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ American Income Fund of America CL C		\$54,801.12	Tax-Deferred		<input type="checkbox"/>
Penn State Federal Credit Union	SP	\$71,864.7	Interest	\$14.09	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Penn State University Alternate Retirement Plan ⇒ CREF Global Equities	SP	\$176,103.05	Tax-Deferred		<input type="checkbox"/>
Penn State University Alternate Retirement Plan ⇒ CREF Social Choice	SP	\$184,123.85	Tax-Deferred		<input type="checkbox"/>
Penn State University Alternate Retirement Plan ⇒ TIAA Traditional	SP	\$208,272.83	Tax-Deferred		<input type="checkbox"/>
Penn State University Tax Deferred Annuity Plan ⇒ CREF Global Equities	SP	\$99,516.23	Tax-Deferred		<input type="checkbox"/>
Penn State University Tax Deferred Annuity Plan ⇒ CREF Growth	SP	\$45,474.26	Tax-Deferred		<input type="checkbox"/>
Penn State University Tax Deferred Annuity Plan ⇒ CREF Social Choice	SP	\$308.93	Tax-Deferred		<input type="checkbox"/>
Penn State University Tax Deferred Annuity Plan ⇒ TIAA Traditional	SP	\$49,352.75	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Bank		\$791.51	None		<input type="checkbox"/>

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

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Bond Fund of America CL C		06/10/2014	S (partial)	\$4,996.15	<input checked="" type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Bond Fund of America CL C		10/6/2014	S (partial)	\$13,333.43	<input checked="" type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Capital Income Builder CI C		01/13/2014	S (partial)	\$4,995.55	<input checked="" type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒		06/10/2014	S (partial)	\$4,960.8	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
American Capital Income Builder CL C					
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Capital Income Builder CL LC		10/6/2014	S (partial)	\$13,306.98	<input checked="" type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Income Fund of America CL C		01/13/2014	S (partial)	\$5,003.21	<input checked="" type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Income Fund of America CL C		06/10/2014	S (partial)	\$4,994.25	<input checked="" type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Income Fund of America CL C		10/6/2014	S (partial)	\$13,327.68	<input checked="" type="checkbox"/>

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Penn State University	Spouse Salary	N/A
Emory University	Spouse Speech	\$500
University of Massachusetts-Amherst	Spouse Speech	\$1,000
Wayne State University	Spouse Speech	\$400
National Institutes of Health	Scientific Reviewer	\$755

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Quicken Loans	September 2012	Mortgage, West Tisbury, Massachusetts	\$398,876.98

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Levinson-Levin Properties, L.L.C.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Aspen Institute Congressional Program	02/15/2014	02/23/2014	Washington, DC - Bogota, Colombia - Washington, DC	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- IRA (Owner: SP)
- Merrill Lynch - The Victoria S. Levin Special Legacy Trust
- Merrill Lynch IRA
- Penn State University Alternate Retirement Plan (Owner: SP)
- Penn State University Tax Deferred Annuity Plan (Owner: SP)

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?

☐ 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. Sander M. Levin , 05/15/2015