

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

**FORM A**  
For use by Members, officers, and employees

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**HAND  
DELIVERED**

LEGISLATIVE RESOURCE CENTER

MARSHA WEDGEWORTH BLACKBURN

(Full Name)

(Daytime Telephone)

2013 MAY 15 PM 12: 52

MC

**Filer Status**  
☒ Member of the U.S. House of Representatives  
State: TN District: 07

☐ Officer Or Employee  
Employing Office:

**Report Type**  
☒ Annual (May 15) ☐ Amendment ☐ Termination

Termination Date:

(Office Use Only)  
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? If yes, complete and attach Schedule I.	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 type="checkbox"/> No <input checked="" 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
Strategic Sales Tactics, Brentwood, TN	Spouse Consulting Income	N/A
State of Tennessee	Legislative Pension	\$4,299

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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BLOCK A <b>Asset and/or Income Source</b> <small>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.  Provide complete names of stocks and mutual funds (do not use ticker symbols.)  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.  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.  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.  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.  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.  For a detailed discussion of Schedule III requirements, please refer to the instruction booklet.</small>	BLOCK B <b>Year-End Value of Asset</b> <small>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.  If an asset was sold during the reporting year and is included only because it generated income, the value should be "None."  * This column is for assets held solely by your spouse or dependent child.</small>	BLOCK C <b>Type of Income</b> <small>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.</small>	BLOCK D <b>Amount of Income</b> <small>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.  * This column is for income generated by assets held solely by your spouse or dependent child.</small>	BLOCK E <b>Transaction</b> <small>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</small>
<p>Prudential IRA as follows:</p>				
<p>Goldman Sachs Large Cap Value Portfolio (formerly Alliance Bernstein Growth &amp; Income</p>	<p>\$1,001 - \$15,000</p>	<p>TAX-DEFERRED</p>	<p>NONE</p>	
<p>Marisco Large Cap Growth</p>	<p>\$1 - \$1,000</p>	<p>TAX-DEFERRED</p>	<p>NONE</p>	
<p>Federated Aggressive Growth</p>	<p>\$1 - \$1,000</p>	<p>TAX-DEFERRED</p>	<p>NONE</p>	
<p>Small Cap Value</p>	<p>\$1,001 - \$15,000</p>	<p>TAX-DEFERRED</p>	<p>NONE</p>	
<p>Newberger Berman Mid Cap Growth</p>	<p>\$1,001 - \$15,000</p>	<p>TAX-DEFERRED</p>	<p>NONE</p>	

**SCHEDULE III - ASSETS AND "UNEARNED" INCOME**

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	MFS Global Equity Fund	\$1,001 - \$15,000	TAX-DEFERRED	NONE	
	Goldman Sachs High Yield	\$1,001 - \$15,000	TAX-DEFERRED	NONE	
	PIMCO Total Return Bond	\$1,001 - \$15,000	TAX-DEFERRED	NONE	
	Guaranteed Return Options (GRO) Plus	\$15,001 - \$50,000	TAX-DEFERRED	NONE	
SP	Prudential IRA as follows:				
SP	Guaranteed Return Options (GRO) Plus	\$50,001 - \$100,000	TAX-DEFERRED	NONE	
SP	AST Money Market	\$1,001 - \$15,000	TAX-DEFERRED	NONE	
SP	Investors Town Center Partners, Brentwood, TN	None	None	NONE	
	Capital Bank, Nashville, TN accounts	\$100,001 - \$250,000	INTEREST	\$201 - \$1,000	
SP	Schwab IRA as follows:				
SP	Money Market	\$1,001 - \$15,000	TAX-DEFERRED	NONE	
SP	Ishares Trust Cohen & Steer Realty Majors Index	\$1,001 - \$15,000	TAX-DEFERRED	NONE	
SP	Powershares Exch Trad Fd RTR Dynamic Mkt Portfolio	\$1,001 - \$15,000	TAX-DEFERRED	NONE	
SP	Wisdomtree Intl Real Estate Sector Fd	\$1,001 - \$15,000	TAX-DEFERRED	NONE	

**SCHEDULE III - ASSETS AND "UNEARNED" INCOME**

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SP	Barklays Cap Intl Treasure Bond ETF	\$1,001 - \$15,000	TAX-DEFERRED	NONE	
SP	Compass Emp Multi Asset Balanced Fund	\$15,001 - \$50,000	TAX-DEFERRED	NONE	
SP	Alps Trust ETF	\$1,001 - \$15,000	TAX-DEFERRED	NONE	P
SP	Guggenheim Exch Trd Fd	\$1,001 - \$15,000	TAX-DEFERRED	NONE	P
SP	Ishares CoreD Total ETF	\$1,001 - \$15,000	TAX-DEFERRED	NONE	P
SP	Synergy Bank, Franklin, TN stock	\$50,001 - \$100,000	None	NONE	
	American Funds Money Market account	\$15,001 - \$50,000	INTEREST	\$1 - \$200	
SP	Capital Bank accounts	\$1,001 - \$15,000	INTEREST	\$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
SP	Alps Trust ETF	P	N/A	4-5-12	\$1,001 - \$15,000
SP	Guggenheim Exch Trd Fd	P	N/A	4-5-12	\$1,001 - \$15,000
SP	Ishares Cored Total ETF	P	N/A	4-5-12	\$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 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
SP	Wells Fargo	Dec 2010	Mortgage on residence, Brentwood, TN	\$250,001 - \$500,000
SP	Capital Bank, Brentwood, TN	Feb 2008	Mortgage on residence, Brentwood, TN	\$50,001 - \$100,000

**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
Heritage Foundation	Jan. 25-26	DC-Philadelphia-DC	Y	Y	N	None
American Enterprise Institute	Mar. 9-10	DC-Sea Island, GA-DC	Y	Y	N	None



**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
Dec 2002	State of Tennessee	Legislative Pension

**FOOTNOTES**

FOOTNOTES			Name MARSHA WEDGEWORTH BLACKBURN	Page 10 of 10
Number	Section / Schedule	Footnote		This note refers to the following item
1	Schedule III	Investors Town Center Partners, Brentwood, TN declared bankrupt during the year		Investors Town Center Partners, Brentwood, TN