2010 SEP -7 AM 9: 57

HAND DELIVERED 273 Pennington Rocky Hill Road

Pennington, NJ 08534

September 3, 2010

Lorraine C. Miller, Clerk of the House

**US House of Representatives** 

Dear Ms. Miller:

I want to clarify that in 2008 my wife, Margaret Lancefield, sold her shares of Fidelity Magellan IRA Fund (valued between \$1,001 and \$15,000) and converted the entire proceeds to a TIAA IRA Equity Index fund. This transaction was not specified on Schedule IV in my 2008 Financial Disclosure Statement submitted in May 2009, although her possession of those funds was noted.

Sincerely,

**Rush Holt** 

**Member of Congress** 

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Exemptions	Trusts-	EXCLUSION OF SPOUSE, DEPENDENT,	If yes, complete and attach Schedule V	Did you, yo (more than	If yes, cor	Did you, yo reportable period?	If yes, con	Dld you, yo	If yes, con	you for a s	If yes, cor	Did you or or more fro	PRELIMINARY INFORMATION	Report Type	Filer Status			CALENDAR TEAR 2009 FINANCIAL DISCLOSORE STATEMENT	JUITED STATES HOUSE OF REPRESENTATIVES	
	0 5 5	NO OF	npiete and	Did you, your spouse, or a dependent child have (more than \$10,000) during the reporting period?	if yes, complete and attach Schedule IV.	ur spouse, o asset in a tr	If yes, complete and attach Schedule III.	ur spouse, 200 in the	If yes, complete and attach Schedule II.	ividual or o sech, appe	If yes, complete and attach Schedule I.	Did you or your spouse have "earned" income (e. or more from any source in the reporting period?	IARY II		K IS		 	TEAK	STAT	
lave you o	Details reg trusts" nec child?	SPOU	attach So	or a depend ring the rep	attach So	or depender ansaction e	end of the lattach So	eporting pe	attach So	rganization arance, or a	l attach So	have "eance in the re	VFORN	Annual (May 15)	ember o			2003	H S∃	
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Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on	Details regarding "Quaiffied 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?	PENDE		Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?	••	Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period?	]  -  -	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	 	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?		Did you or your spouse have "earned" income (e.g., salaries or tees) of \$200 or more from any source in the reporting period?	امرا	<b>S</b>	ıtatives	(Full Name)	Rush Holt	DISCE	OF R	<b>!</b>
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"unearned" income, transactions, or liabilities of a spouse or dependent child not answer "yes" unless you have first consulted with the Committee on	e on Standarails of si	INFORMATION ANSW	sche	Each	If yes	IX. entity?	If yes	VIII. currer	If yes	VII. reimb	If yes	VI. the report exempt)?	QUESTIONS	on	Officer Or Employee				For L	
sactions, you have	dards of C	ANSV	dule att	Each questio	If yes, complete	u have any	If yes, complete and attach Schedule VIII.	Did you hold any repor current calendar year?	If yes, complete	Did you, your spous reimbursements for from one source)?	If yes, complete	u, your spo borting peri x)?	SNC	Termina					FORM A Page 1 of 4 For use by Members, officers, and employees	
or liabiliti first consi		ER E	ached f	on in thi		reportable	and atta	reportable   /ear?	and atta	use, or a cr for travel in ?	and atta	use, or a d od (i.e., agg		Termination Date	Employii	<u></u>			A mbers	
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apendent on nittee on	ficial Conduct and certain other "excepted benefiting you, your spouse, or dependent	SE QUE	schedule attached for each "Yes" response	answere		Did you have any reportable agreement or arrangement with an outside entity?		Did you hold any reportable positions on or before the date of filing in the current calendar year?	 	se, or a dependent child receive any reportable travel r travel in the reporting period (worth more than \$335		Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$335 and not otherwise exempt)?							Page 1 of 4	
child	"	ER EACH OF THESE QUESTIONS		n in this part must be answered and the appropriate		n outside		filing in the		Did you, your spouse, or a dependent child receive any reportable travel or relimbursements for travel in the reporting period (worth more than \$335 from one source)?		otherwise		more late.	A \$20 be as	Q Q	SS uio	<b></b>		
Yes	Yes	Š		ne appro		Yes		<b>Yes</b>	<u> </u>	Yes		Yes		more than 30 days late.	A \$200 penalty shall be assessed against anyone who files	(Office Use Only)	-	# 5 1 -2	DELI	Į
<b>X</b>	No.			priate		: : <b>₹</b>		<u>-</u> <b>8</b> □	ļ ,	No				days	ly shall against files	Only)	ं 9: 5	2.3	DELIVERED	D N D
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## SCHEDULE I - EARNED INCOME

Name Rush D. Holt

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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	Туре	Amount
University Medical Center of Princeton	Spouse salary	N/A

(This pay in whated from my May 2009 submission. Apparently after submission these two pages were lost.)

SCHEDULE III - A
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ASSETS.
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<u>ا</u> SP SP SP <u>\_</u> in the optional column on the far left. if you so choose, you may indicate that an asset or income source is parent or sibling; any deposits totaling \$5,000 or less in personal debt owed to you by your spouse, or by your or your spouse's child, Exclude: Your personal residence(s) (unless there is rental income); any that of your spouse (SP) or dependent child (DC) or is jointly held (JT), savings accounts; any financial interest in or income derived from U.S. that is not publicly traded, state the name of the business, the nature of retirement plans (such as 401(k) plans) that are self directed (i.e., plans a fair market value exceeding \$1,000 at the end of the reporting period. Government retirement programs. its activities, and its geographic location in Block A. For additional and its value at the end of the reporting period. For an active business plans that are not self-directed, name the institution holding the account in the account that exceeds the reporting threshold. For retirement mutual funds (do not use ticker symbols). For all IRAs and other than \$200 in "unearned" income during the year. For rental property or Identify (a) each asset held for investment or production of income with information, see the instruction booklet. investments), provide the value and income information on each asset in which you have the power, even if not exercised, to select the specific and, provide a complete address. Provide full names of stocks and and (b) any other assets or sources of income which generated more Asset and/or Income Source CREF stock fund Savings 2025 457(b) Congressional Credit Union Community Bank, NA CREF Stock Fund Fidelity Freedom Retirement Fidelity Freedom 2025 Rollover \$50,000 \$15,001 -\$500,000 \$250,001 \$500,000 \$250,001 \$250,000 \$100,001 \$15,000 \$1,001 -\$15,000 \$1,001 at close of reporting the value should be it is generated income, value, please specify other than fair market year. If you use a asset was sold and is the method used. If an valuation method Value of Asset included only because Year-End Name Rush Holl **BLOCK B** DIVIDENDS during the calendar year. apply. For retirement Check all columns that DIVIDENDS DIVIDENDS DIVIDENDS not generate any Income Check "None" if asset did even if reinvested, should income by checking the other assets including all specific investments, you plans or accounts that do be listed as income. Dividends and Interest, appropriate box below. may write "NA". For all not allow you to choose NTEREST NTEREST RAs, indicate the type of Type of Income \$15,001 - \$50,000 \$201 - \$1,000 \$5,001 - \$15,000 \$50,001 - \$100,000 \$1 - \$200 \$1 - \$200 earned or generated. of income by checking the IRAs, indicate the category other assets, including all "NA" for income. For all For retirement plans or if reinvested, should be Dividends and interest, even appropriate box below. accounts that do not allow investments, you may write you to choose specific "None" if no income was listed as income. Check Amount of Income v U σ ס \$1,000 in reporting year. exceeding exchanges (E) (P), sales (S), or Indicate if asset Transaction had purchases BLOCKE Page 4 of +

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	EDULE III -
 	ASSETS A
	SCHEDULE III - ASSETS AND "UNEARNED" II
	NEARNED" INCOME
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	Name
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SCHEDI	SCHEDULE III - ASSETS AND "UNEARNED" INCOME	Name Rush Holt	Holt		Page Sof 7
	Froelich Land Trust, 80-acre family farm share, Livingston County, IL	\$100,001 - \$250,000	RENT	\$201 - \$1,000	
Sp	Lancefield Farm Share, 400- acre family farm, Amity, OR	\$100,001 - \$250,000	Other: Farm Income	\$5,001 - \$15,000	
SP	Lancefield Farm Share, 400- acre family farn share, Amity, OR	\$100,001 - \$250,000	CAPITAL GAINS	\$100,001 - \$1,000,000	S(part)
SP	Prudential Medley 403(b) Fund	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	<b>70</b>
	Rental Cabins, AuSable Froks, NY	\$100,001 - \$250,000	RENT	\$1,001 - \$2,500	
JT	Rental House, Pennington,NJ	\$100,001 - \$250,000	RENT	\$5,001 - \$15,000	 
SP	TIAA IRA Equity Index Fund	\$15,001 - \$50,000	DIVIDENDS	\$2,501 - \$5,000	<b>'</b>
	TIAA Traditional	\$100,001 - \$250,000	INTEREST	\$5,001 - \$15,000	<b>0</b>
SP	TIAA Traditional Fund	\$100,001 - \$250,000	INTEREST	\$5,001 - \$15,000	
: 	Vanguard Windsor Retirement Fund	\$50,001 - \$100,000	DIVIDENDS	\$1,001 - \$2,500	 
JT	Wachovia Bank	\$250,001 - \$500,000	INTEREST	\$201 - \$1,000	·- ·         

## SCHEDULE IV - TRANSACTIONS

Name Rush Holt

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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,	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
dS	CREF Stock Fund (reinvest dividend)	ם	A/N	quarterly	\$50,001 - \$100,000
	CREF stock fund (reinvest dividend)	<b>ט</b>	NA	quarterly	\$15,001 - \$50,000
Sp	Fidelity 403(b) ContraFund, Magellan Fund, Asset Mgr (converted to IRA Rollover)	S	NO	3/2/09	\$100,001 - \$250,000
SP	Fidelity Freedom 2025 Rollover IRA (rollover and reinvestment)	סד	N/A	3/2/09 and quarterly	\$100,001 - \$250,000
SP	Fidelity Freedom Retirement Savings 2025 457(b)	7	N/A	quarterly (after 3/2/09)	\$15,001 - \$50,000
SP	Lancefield Farm Share, 400-acre family farn share, Amity, OR	S(part)	Yes	12/31/09	\$250,001 - \$500,000
SP	Prudential Medley 403(b) Fund (reinvest dividend)	ס	N/A	quarterly	<200
SP	TIAA IRA Equity Index Fund (reinvest dividend)	9	N/A	quarterly	\$1,001 - \$15,000
	TIAA Traditional (reinvest interest)	<b>סר</b>	N/A	quarterly	\$1,001 - \$15,000
SP	TIAA Traditional Fund (reinvest interest)	ס	N/A	quarterly	\$1,001 - \$15,000
	Vanguard Windsor Retirement Fund (reinvest dividend)	<b>ט</b>	NA	quarterly	\$1,001 - \$15,000

## SCHEDULE VII - TRAVEL PAYMENTS AND REIMBURSEMENTS

Name Rush D. Holt

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spouse or dependent child that is totally independent of his or her relationship to you. 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 sponsor. Exclude: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under 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 Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$335 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

Source	Date(s)	Point of Departure DestinationPoint of Return	Lodging? (Y/N)	Food? (Y/N)	Was a Family ? Food? Member Included? (Y/N) (Y/N)	Days not at sponsor's expense
EVT/WOTE	August 10	NJ-Montreal	Z	<b>Y</b>	Z	none
Franklin Center for Global Policy Exchange	August 10- 12	Montreal-Ottowa-NY	~	~	Z	1 day
Aspen Institute congression Program	May 26- June 1	NJ-Croatia-NJ	~	~	Υ	none
Aspen Institute Congressional Program	Aug 17-24	NJ-Calgary-NJ	Υ	~	Υ	3 days
Aspen Institute Congressional Program	Feb 14-23	NJ-Amman and Sweimeh, Jordan-Jerusalem, Israel-NJ	~	~	Υ	2 days