

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

**FORM A** Page 1 of 5  
For use by Members, officers, and employees

**HAND DELIVERED**

LEGISLATIVE RESOURCE CENTER

TED POE

(Full Name)

(Daytime Telephone)

(Office Use Only)

2013 MAY 15 AM 9:37

ME

**Filer Status** ☒ Member of the U.S. House of Representatives State: TX District: 02

☐ Officer Or Employee

U.S. HOUSE OF REPRESENTATIVES  
A \$200 penalty shall be assessed against anyone who files more than 30 days late.

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

Termination Date:

## 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 \$50 from one source)? If yes, complete and attach Schedule VII.	Yes <input type="checkbox"/> No <input checked="" 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 type="checkbox"/> No <input checked="" 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 type="checkbox"/> No <input checked="" type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule IX.	Yes <input type="checkbox"/> No <input checked="" 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 type="checkbox"/> No <input checked="" 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**

Name TED POE

Page 2 of 5

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
HARRIS COUNTY TEXAS	RETIREMENT PENSION	\$69,514
TEXAS COUNTY AND DISTRICT RETIREMENT SYSTEM	RETIREMENT PENSION	\$57,229
HUMBLE INDEPENDENT SCHOOL DISTRICT	SPOUSE SALARY	N/A
NORTHLAND CHRISTIAN SCHOOL	SPOUSE SALARY	N/A

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name TED POE

Page 3 of 5

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) provide the value for each asset held in the account that exceeds the reporting thresholds.</p> <p>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.</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>For a detailed discussion of Schedule III requirements, please refer to the instruction booklet.</p>		<p>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.</p> <p>If an asset was sold during the reporting year and is included only because it generated income, the value should be "None."</p> <p>* This column is for assets held solely by your spouse or dependent child.</p>	<p>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.</p>	<p>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.</p> <p>* This column is for income generated by assets held solely by your spouse or dependent child.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
CONGRESSIONAL FEDERAL CREDIT UNION		\$50,001 - \$100,000	DIVIDENDS	\$201 - \$1,000	
HARRIS COUNTY FEDERAL CREDIT UNION		\$50,001 - \$100,000	DIVIDENDS	\$1 - \$200	
FRANKLIN FEDERAL TAX FREE INCOME C		\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
FRANKLIN HIGH YIELD CLASS C		\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
TRANSAMERICA ASSET ALLOCATION		\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
IVY FUND ASSET STRATEGY CLASS C		\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	

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

Name TED POE

Page 4 of 5

		None	DIVIDENDS	NONE	
	MORGAN KEEGAN GENERAL MONEY MARKET				
SP	TEMPLETON GLOBAL BOND FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
SP	IVY FUND ASSET STRATEGY CLASS C	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	REAL ESTATE, DRIFTWOOD, TX	\$100,001 - \$250,000	None	NONE	
SP	INLAND AMERICAN REAL ESTATE TRUST	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	AMERIFUNDS GROWTH FUND C	None	None	NONE	
SP	MFS VALUE CLASS C	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP	AMERIFUNDS NEW WORLD CLASS C	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

## SCHEDULE VIII - POSITIONS

Name TED POE

Page 5 of 5

Report all positions, compensated or uncompensated, held during the current calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or any business enterprise, any nonprofit organization, any labor organization, or any educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities; positions solely of an honorary nature; and positions listed on Schedule I.

Position	Name of Organization
BOARD MEMBER	JUSTICE FOR CHILDREN
BOARD MEMBER	HUMBLE INDEPENDENT SCHOOL DISTRICT FOUNDATION
ADVISORY BOARD MEMBER	ARCHER CENTER FELLOWSHIP PROGRAM
BOARD MEMBER, DIRECTOR	TEXAS STATE SOCIETY
HONORARY BOARD MEMBER	HOUSTON LIVESTOCK SHOW AND RODEO
HONORARY COUNCIL	SECOND CHANCE EMPLOYMENT SERVICES