

# UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

**FORM A** Page 1 of 51  
For use by Members, officers, and employees

Zoe Lotgren  
(Full Name)

(202) 225-3072  
(Daytime Telephone)

**HAND DELIVERED**  
MC  
LEGISLATIVE RESOURCE CENTER  
2009 MAY 15 PM 3:31  
(Office Use Only)

<b>Filer Status</b>	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: CA District: 16	<input type="checkbox"/> Officer Or Employee	Employing Office:
<b>Report Type</b>	<input checked="" type="checkbox"/> Annual (May 15)	<input type="checkbox"/> Amendment	<input type="checkbox"/> 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 \$335 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 \$335 from one source)?	Yes <input type="checkbox"/> No <input checked="" 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 \$1,000 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 checked="" type="checkbox"/> No <input type="checkbox"/>
If yes, complete and attach Schedule III.		If yes, complete and attach Schedule VIII.	
IV. Did you, your spouse, or a 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 checked="" type="checkbox"/> No <input 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

<b>Trusts-</b>	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"/>
<b>Exemptions--</b>	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 Standards of Official Conduct.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

**SCHEDULE I - EARNED INCOME**

Name Zoe Loigren

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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
John Marshall Collins, P.C.	Spouse Salary	N/A

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Zoe Loifgren

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BLOCK A Asset and/or Income Source		BLOCK B Year-End Value of Asset	BLOCK C Type of Income	BLOCK D Amount of Income	BLOCK E Transaction
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.		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."	Check all columns that apply. For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA". For all other assets including all IRAs, indicate the type of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if asset did not generate any income during the calendar year.	For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, including all IRAs, indicate the category of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if no income was earned or generated.	Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.
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.					
SP	1-800 Flowers Com Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	S
SP	Acom Company Ltd ADR Sponsored ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Aegon N V Res SHS NY Regist/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Aeropostale/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	PS
SP	Aetna Inc New/JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS	\$1 - \$200	S
SP	Agrium Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$201 - \$1,000	S

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Albany Molecular Research/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	Alcatel Lucent/JMC PC Ret Plan 401K	None	NONE	NONE	S
SP	ALCOA Inc/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	Alpha Natural Resource/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$5,001 - \$15,000	S
SP	Alumina LTD Spons ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Amazon.com/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Ameren Corporation/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	American Electric Power/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	American Express Co/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	American Intl Group Inc/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	S
SP	Amgen Inc/JMC PC Ret Plan 401K PSP	None	None	NONE	PS
SP	AMPCO Pittsburgh Corp/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Angiodynamics Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Anglogold Ashanti LTD ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Apex Silver Mines LTD/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Archer Daniels Midland Company/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Arthrocare Corporation/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Astrazenega PLC/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	AT&T/JMC PC Ret Plan 401K PSP	None	DIVIDENDS/CAP ITAL GAINS	\$1,001 - \$2,500	S
SP	Avon Products/JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS	\$201 - \$1,000	S
SP	AXSYS Technologies Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$2,501 - \$5,000	S
SP	Barrick Gold Corp/JMC PC Ret Plan 401K	None	DIVIDENDS/CAP ITAL GAINS	\$2,501 - \$5,000	PS
SP	Bear Stearns 0.0/John Marsahl Collins Ret Plan	None	CAPITAL GAINS	\$2,501 - \$5,000	S
SP	Benfield Group LTD ADR	None	DIVIDENDS	\$1 - \$200	PS
SP	Big Lots Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	Biogen Idec Inc/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Boston Scientific Corp/JMC PC Ret Plan 401K PSP	None	None	NONE	PS
SP	BP PLC/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Bristol Myers Squibb Co/JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS	\$201 - \$1,000	PS
SP	Braker Corp/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Bucyrus Intl Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Buffalo Wild Wings/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Cal Maine Foods Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Calgon Carbon Corp/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$2,501 - \$5,000	S
	California Public Employee Retirement System	\$100,001 - \$250,000	INTEREST	\$5,001 - \$15,000	
SP	Carneco Corp/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Cameron International/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Cent Elec Bras PFD CL B/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Centrais Elec Bras Spons/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$201 - \$1,000	S
SP	Chevron Corp/JMC PC Ret Plan 401K PSP	None	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	S
SP	Chungthwa Telecom/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1,001 - \$2,500	S
SP	Citigroup Inc/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Clean HBRS Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	PS
SP	Cleveland Cliffs Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	CLP Higgs Spn ADR/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	S
SP	CNH Global NV/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Comcast Corp CI A/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Compass Minerals Intl Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Conocophillips/JMC PC Ret Plan 401K PSP	None	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	S
SP	Consol Energy Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Core Laboratories NV/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1,001 - \$2,500	S
SP	Corinthian Colleges Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Covidien LTD/JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS/DIVIDENDS	\$201 - \$1,000	PS
SP	Crawford & Company CL/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Cree Inc/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Cryolife Inc/JMC PC Ret Plan 401K	None	None	NONE	PS

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SP	CSG Systems Intl Inc/ JMC PC Ret. Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	CSX Corp/JMC PC Ret Plan 401K PSP	None	DIVIDENDS/CAPITAL GAINS	\$2,501 - \$5,000	S
SP	Cubic Corporation Common/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Currency Japanese Yen/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	S
SP	Currency Shares Euro TR/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$201 - \$1,000	S
SP	Currency Shares/JMC PC Ret Plan 401K (converted to currency Japanese Yen)	None	None	NONE	S
SP	Cyberonics Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Dai Nippon Printing/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S.
SP	Daiwa House Ind Limited/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Dean Foods Company/JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS	\$1 - \$200	PS
SP	Dell Inc/ JMC PC Ret Plan 401K PSP	None	None	NONE	PS
SP	Devry Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$201 - \$1,000	PS
SP	Diamond Offshore/JMC PC Ret Plan 401K	None	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	S



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

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SP	Dresser Rand Group/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	DWS Commodity Secs/John Marshall Collins PC Ret Plan	None	CAPITAL GAINS	\$5,001 - \$15,000	S
SP	Dynamic Materials Corp/JMC PC Ret Plan 401K	None	None	NONE	S
SP	E N I Spa Spous ADR/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	S
SP	Eaton Vance Tax Glib/John Marshall Collins Ret Plan	None	DIVIDENDS	\$201 - \$1,000	S
SP	Eaton Vance Tax Global Buy Write Opportunities Fund/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$201 - \$1,000	S

	Eaton Vance Tax Global/WFB IRA C/F Zoe Lofgren	None	DIVIDENDS	\$201 - \$1,000	S
SP	EOG Resources Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Ericsson L M tel Company/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
	Evergreen Intl Balanced/WFB IRA C/F Zoe Lofgren	None	DIVIDENDS	\$201 - \$1,000	S
SP	Fannie Mae/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	Faro Technologies Inc/JMC PC Ret Plan 401K	None	None	NONE	S
	Fdity, New Insights FD A/WFB IRA C/F Zoe Lofgren	None	CAPITAL GAINS	\$201 - \$1,000	S
SP	Finish Line Inc Class A/JMC PC Ret Plan 401K	None	None	NONE	PS

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

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SP	Electronics/JMC PC Ret Plan 401K PSP	None	None	NONE	PS
SP	Flowserve Corp/JMC PC Ret Plan 401K	None	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	S
SP	Fluor Corp New/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Fording Candadian Coal/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$2,501 - \$5,000	PS
SP	Freds Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	Freeport Moran Copper/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Fresh Del Monte Produce Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	FTI Consulting Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	Fuji Photo Film/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Gamestop Corp New/JMC PC Ret Plan 401K	None	None	NONE	S
SP	GAP Inc/JMC PC Ret Plan 401K PSP	None	DIVIDENDS/CAPITAL GAINS	\$1 - \$200	PS
SP	General Electric Company/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	General Motors Corp/JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS/DIVIDENDS	\$2,501 - \$5,000	PS
SP	Genesco Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Geron Corp/John Marshall Collins Ret Plan	None	None	NONE	S
SP	Gibraltar Industries Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Gold Fields Limited New/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Greater Bay Bankcorp Stock, Bought by Wells Fargo Bank--see Wells Fargo Bank stock	None	None	NONE	
SP	Hachijuni Bank LTD ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Hansen Natural Corp/South Bay Honda	None	None	NONE	S
SP	Hess Corporation/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDEN DS	\$1 - \$200	PS

SP	Hewlett-Packard CO/JMC Ret Plan 401K PSP	None	DIVIDENDS/CAPIT AL GAINS	\$1,001 - \$2,500	S
SP	Hibbett Sports Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Hologic Inc/JMC PC Ret Plan 401K PSP	None	None	NONE	PS
SP	Home Depot Inc/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	Honeywell Intl Inc/JMC Ret Plan 401K PSP	None	DIVIDENDS/CAPIT AL GAINS	\$1,001 - \$2,500	S
	HSBC ADR A 6.2%/WFB IRA C/F Zoe Loifgren	None	DIVIDENDS	\$1 - \$200	S
	ICMARC-Aston/Optimum Mid Cap Fund N	\$1,001 - \$15,000	None	NONE	

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

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	ICMARC- Investment Company of America	\$1,001 - \$15,000	None	NONE	
	ICMARC- Lord Abbett Mid Cap Value A	\$1,001 - \$15,000	None	NONE	
	ICMARC- Plus Fund (Formerly CMA Deferred Compensation CSs)	\$100,001 - \$250,000	CAPITAL GAINS	\$1,001 - \$2,500	
	ICMARC- VT Fidelity Contrafund	\$15,001 - \$50,000	None	NONE	
	ICMARC- VT T. Rowe Price Small Cap Fund	\$1,001 - \$15,000	None	NONE	
	ICMARC- VT T. Rowe Price Small Cap Stock	\$1,001 - \$15,000	None	NONE	
	ICMARC-Aston/Optimum Mid Cap Fund N	\$1,001 - \$15,000	None	NONE	
	ICMARC-Fidelity Diversified Int'l	\$15,001 - \$50,000	None	NONE	
SP	Illumina Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	PS
SP	Immucor Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	Impala Platinum ADR 1/4 SH/JMC Ret Plan 401K	None	CAPITAL GAINS/DIVIDEN DS	\$201 - \$1,000	PS
SP	Intel Corp/JMC Ret Plan 401K PSP	None	None	NONE	PS
SP	International Business/JMC Ret Plan 401K PSP	None	DIVIDENDS/CAPITAL GAINS	\$2,501 - \$5,000	S
SP	Interpublic Group/JMC Ret Plan 401K PSP	None	None	NONE	S

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	ISHARES TR MSCI Emerging/John Marhsall Collins Ret Plan	None	CAPITAL GAINS/DIVIDEN DS	\$5,001 - \$15,000	S
SP	ISHRS S&P LATN AM/John Marshall Collins Ret Plan	None	CAPITAL GAINS/DIVIDEN DS	\$15,001 - \$50,000	S
SP	ISHS RSSLL 2000 Grth Index/ IRA/John Marshall Collins	None	CAPITAL GAINS/DIVIDEN DS	\$1,001 - \$2,500	S
SP	ISHS RSSLL 2000 Val Index/IRA John Marshall Collins	None	DIVIDENDS	\$1 - \$200	S
SP	ITT Education Services Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Ivanhoe Mines Limited/JMC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	Jo Ann Stores Inc/JMC PC Ret Plan 401K	None	NONE	NONE	PS
SP	John Marshall Collins PC- Stock	\$250,001 - \$500,000	None	NONE	
SP	Joy Global Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	JPMORGAN Chase & Co/JMC Ret Plan 401K PSP	None	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	S
SP	Juniper Networks Inc/JMC Ret Plan 401K	None	None	NONE	S
SP	Karnan Corporation/JMC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Kansas City Southern/JMC PC Ret Plan 401K	None	None	NONE	PS

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	KAO Corp Spons ADR/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	Kimberly-Clark Corp/JMC Ret Plan 401K PSP	None	DIVIDENDS/CAPITAL GAINS	\$1 - \$200	PS
SP	Kinross Gold Corp No Par/JMC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	S
SP	Korea Electric Spons ADR/JMC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Kraft Foods CI A/JMC Ret Plan 401K PSP	None	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	S
SP	KT Corp Spons ADR/JMC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	La Pac (Louisiana Pacific) Corp/ JMC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	LIHIR Gold Limited/JMC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	PS
SP	Lindsay Corp/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	LKQ Corp/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Lommin PLC ADR New/ JMC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$1,001 - \$2,500	PS
SP	LSI Corp/JMC Ret Plan 401K PSP	None	None	NONE	PS
SP	Lucent (Alcatel Lucent)/JMC Ret Plan 401K	None	None	NONE	S
SP	Macys Inc/JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS/DIVIDENDS	\$201 - \$1,000	PS

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Magna Int'l Inc. Class A/JMC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Massey Energy Corp./JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$1 - \$200	PS
SP	Matsushita Elec Ind ADR/JMC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$1 - \$200	S
SP	Mattel Inc./JMC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	PS
SP	McDermott International/JMC Ret Plan 401K	None	None	NONE	S
SP	Meadwestvaco Corp./JMC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	S
SP	Memc Elect Materials Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
	Merrill Lynch & Co PFD 2	None	DIVIDENDS	\$1 - \$200	S
SP	Millennium Pharm Inc/JMC Ret Plan 401K PSP	None	CAPITAL GAINS	\$2,501 - \$5,000	S
SP	Mitsui Sumitomo/JMC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Monsanto Company/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Mosaic Company/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Motorola Incorporated/JMC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	NASDAQ OMX Group Inc/JMC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	S

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	NASDAQ Stock Market/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	S
SP	NAVTEQ Corp/JMC Ret Plan 401K	None	None	NONE	S
SP	NEC Electronics/JMC PC Ret Plan 401K	None	CAPITAL GAINS	NONE	S
SP	Netflix Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	New Market Corporation/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	New York & Company Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Newcrest Mining LTD/JMC PC Ret Plan 401K	None	DIVIDENDS/CAP ITAL GAINS	\$201 - \$1,000	PS
SP	Newmont Mining Corp Hldg/ JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS	\$201 - \$1,000	S
SP	Nexen Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	NII Holdings Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Nippon Tel&Tel Spons ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	NN Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Noble Corporation/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDEN DS	\$201 - \$1,000	S
SP	Novagold Res Inc New/JMC PC Ret Plan 401K	None	None	NONE	S



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

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SP	NPS Pharmaceutical Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Nvidia Corp/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Omniceil Inc/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Omnicare Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	On Assignment Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Owens Illinois Inc New/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Pan American Silver/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Paraxel Intl Corp/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	PS
SP	Park Ohio Hldgs Corp/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Perford Corp/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	PepsiAmericas Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Perrigo Company/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Petro-CD&JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Petrochina Company ADR Limit/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Zoe Loftgren					Page 18 of 51
SP	PetroHawk Energy Corp/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Pfizer Inc/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$201 - \$1,000	PS
SP	Pioneer National Reserve Co./JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Plexus Corp/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Potash Corp Sask Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDEN DS	\$2,501 - \$5,000	S
SP	Powerwave Tech Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Precision Castparts Corp/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Priceline.com Inc New/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$2,501 - \$5,000	S
SP	Promise Co LTD ADR?JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Quicksilver Resources Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Qwest Comm Intl Inc/JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS/DIVIDEN DS	\$201 - \$1,000	S
SP	Range Resources Corp/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Robbins & Myers Inc/JMC PC Ret Plan 401K	None	DIVIDENDS/CAPIT AL GAINS	\$201 - \$1,000	S
SP	Rock Tenn Co CLA/JMC PC Ret. Plan 401K	None	None	NONE	PS

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

Name Zoe Lotgren					Page 19 of 51
SP					
SP	Royal Dutch Shell ADR B/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Ryder System Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	S Oil Corp Spons ADR/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Sanofi Aventis/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Sara Lee Corp/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	Sauer-Danfoss Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Scansource Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Schlumberger LTD/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Sekisui House LTD ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Shaw Group Inc/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Shiseido LTD Spons ADR/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDEN DS	\$201 - \$1,000	S
SP	Sigma Designs Inc/JMC PC Ret Plan 401K	None	None	NONE	S
SP	SK Telecom LTD Spons ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Societe GENL France ADR/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	PS

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

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SP	Sonosite Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Sony Corp/JMC PC Ret Plan 401K PSP	None	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	PS
SP	Southern Copper Corp Del/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	St. Paul Trivis Cos/JMC PC Ret Plan 401K PSP	None	CAPITAL GAINS	\$201 - \$1,000	S
SP	Statolithydro ASA/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	PS
SP	Stora Enso Corp ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Sumitomo Bank LTD/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$1 - \$200	PS
SP	Suncor Energy Inc/JMC PC Ret Plan 401K	None	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	PS
SP	Sunpower Corp CL A Class/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Swisscom Spors ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$201 - \$1,000	S
SP	Synaptics Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	T D K Corp ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Technip Spors ADR New/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$1 - \$200	PS
SP	Tecumseh Products Co/JMC PC Ret Plan 401K	None	None	NONE	PS

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

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SP	Tenet Healthcare Corp/JMC PC Ret Plan 401K PSP	None	None	NONE	PS
SP	Thoratec Corp/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Time Warner Inc New/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	Toll Brothers Inc/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Tomkins PLC Spons ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Toppan Printing Limited/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Total S A Spon ADR/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	S
SP	Travelers Companies Inc/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	S
SP	Trex Company Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	Tyco Electronics LTD/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	Tyco Intl LTD New/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	UBS AG New/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	United Therapeutics Corp/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1 - \$200	PS
SP	United Utilities PLC/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S

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

Name Zoe Lofgren

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SP	UPM Kymmenene Corp/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Urban Outfitters Inc./JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$201 - \$1,000	PS
SP	UTD Utils Group Spons ADR/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Valassis Communications/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Valero Energy Corp/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS
SP	Valmont Industries Inc/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Varian Med Syst Inc Systems/JMC PC Ret Plan 401K	None	CAPITAL GAINS	\$1,001 - \$2,500	PS
SP	Varian Semiconductor/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Vodafone GRP PLC New ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	WACOAL Holdings Corp ADR/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	S
SP	Wal-Mart Stores Inc/JMC PC Ret Plan 401K	None	CAPITAL GAINS/DIVIDENDS	\$201 - \$1,000	PS
SP	Warner Music Group Corp./JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Waste Management Inc Del/JMC PC Ret Plan 401K PSP	None	DIVIDENDS	\$1 - \$200	PS

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Watson Pharmaceuticals/JMC PC Ret Plan 401K PSP	None	None	NONE	PS
SP	Wells Fargo & Co Cash Swe/ WF Advantage Money Market	\$500,001 - \$1,000,000	INTEREST	\$5,001 - \$15,000	
SP	Wells Fargo & Co New/ John Marshall Collins	None	DIVIDENDS	\$201 - \$1,000	S
SP	Wells Fargo Bank Stock/John Marshall Collins Ret Plan	None	DIVIDENDS	\$2,501 - \$5,000	S
JT	Wells Fargo Checking Account	\$1,001 - \$15,000	INTEREST	\$201 - \$1,000	
SP	Western Digital Corp/JMC PC Ret Plan 401K	None	None	NONE	S
SP	Wet Seal Inc Class A/JMC PC Ret Plan 401K	None	None	NONE	PS
SP	Whole Foods/JMC PC Ret Plan 401K	None	DIVIDENDS	\$1 - \$200	PS
SP	Xerium Technologies Inc/JMC PC Ret Plan 401K	None	None	NONE	PS

# 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 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, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Acom Company Ltd ADR Sponsored ADR/JMC PC Ret Plan 401K	S	3 dates: 02-28-08 to 09-26-08	\$1,001 - \$15,000
SP	Aeropostale/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Aetna Inc New/JMC PC Ret Plan 401K PSP	S	8 dates: 1-23-08 to 9-24-08	\$1,001 - \$15,000
SP	Agrium Inc/JMC PC Ret Plan 401K	S	3 dates: 1-18-08 to 9-26-08	\$1,001 - \$15,000
SP	Albany Molecular Research/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Alcatel Lucent/JMC PC Ret Plan 401 K PSP	S	01-08-08	\$1,001 - \$15,000
SP	Alcatel Lucent/JMC PC Ret Plan 401K	S	9-26-08	\$1,001 - \$15,000
SP	ALCOA Inc/JMC PC Ret Plan 401K PSP	PS	6 dates: 1-9-08 to 9-17-08P; 9-16-08, 9-24-08S	\$1,001 - \$15,000
SP	Alpha Natural Resource/JMC PC Ret Plan 401K	S	09-23-08	\$1,001 - \$15,000
SP	Alumina LTD Spors ADR/JMC PC Ret Plan 401K	S	09-26-08	\$1,001 - \$15,000
SP	Amazon.com/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000



# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Ameren Corporation/JMC PC Ret Plan 401K PSP	PS	1-8-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	American Electric Power/JMC PC Ret Plan 401K PSP	PS	6-5-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	American Express Co/JMC PC Ret Plan 401K PSP	PS	4-28-08, 6-5-08P; 3 dates: 1-23-08 to 09-24-08S	\$1,001 - \$15,000
SP	American Intl Group Inc/JMC PC Ret Plan 401K PSP	S	01-23-08, 09-15-08	\$1,001 - \$15,000
SP	Amgen Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Amgen Inc/JMC PC Ret Plan 401K PSP	PS	3-24-08, 3-25-08P; 11 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	AMPCO Pittsburgh Corp/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08S	\$1,001 - \$15,000
SP	Angiodynamics Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Anglogold Ashanti LTD ADR/ JMC PC Ret Plan 401K	PS	5 dates: 2-13-08 to 7-23-08P; 4 dates: 6-20-08 to 9-26-08S	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Apex Silver Mines LTD/JMC PC Ret Plan 401K	S	09-16-08	\$1,001 - \$15,000
SP	Archer Daniels Midland Company/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Arthrocare Corporation/JMC PC Ret Plan 401K	S	1-18-08, 03-25-08	\$1,001 - \$15,000
SP	Astrazenega PLC/JMC PC Ret Plan 401K	S	7-10-08, 8-1-08	\$1,001 - \$15,000
SP	AT&T/JMC PC Ret Plan 401K PSP	S	4 dates: 01-23-08 to 09-24-08	\$1,001 - \$15,000
SP	Avon Products/JMC PC Ret Plan 401K PSP	S	1-22-08	\$1,001 - \$15,000
SP	AXSYS Technologies Inc/JMC PC Ret Plan 401K	S	5 dates: 1-18-08 to 10-16-08	\$1,001 - \$15,000
SP	Barrick Gold Corp/JMC PC Ret Plan 401K	PS	3-20-08, 4-30-08P; 9 dates: 1-3-08 to 9-26-08S	\$1,001 - \$15,000
SP	Bear Stearns 0.0/John Marshall Collins Ret Plan	S	10-7-08	\$1,001 - \$15,000
SP	Benfield Group LTD ADR	PS	2-26-08P; 6-24-08S	\$1,001 - \$15,000
SP	Big Lots Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000

# 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 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, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Biogen Idec Inc/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08S	\$1,001 - \$15,000
SP	Boston Scientific Corp/JMC PC Ret Plan 401K PSP	PS	4 dates: 1-7-08 to 6-5-08P; 3 dates: 01-23-08 to 9-24-08S	\$1,001 - \$15,000

SP	BP PLC/JMC PC Ret Plan 401K	S	9-26-08	\$1,001 - \$15,000
SP	Bristol Myers Squibb Co/JMC PC Ret Plan 401K PSP	PS	6 dates: 7-11-08 to 9-11-08P; 9-16-08, 9-24-08S	\$1,001 - \$15,000

SP	Brucker Corp/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Bucyrus Intl Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Buffalo Wild Wings/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Cal Maine Foods Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Calgon Carbon Corp/JMC PC Ret Plan 401K	S	01-18-08, 03-25-08	\$1,001 - \$15,000
SP	Carneco Corp/JMC PC Ret Plan 401K	PS	8-11-08, 9-10-08P; 9-26-08S	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Cameron International/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Cent Elec Bras PFD CL B/JMC PC Ret Plan 401K	S	9-26-08	\$1,001 - \$15,000
SP	Centrais Elec Bras Spons/JMC PC Ret Plan 401K	S	3 dates: 3-18-08 to 9-26-08	\$1,001 - \$15,000
SP	Chevron Corp/JMC PC Ret Plan 401K PSP	S	3 dates: 01-23-08 to 9-24-08	\$1,001 - \$15,000
SP	Chunghua Telecom/JMC PC Ret Plan 401K	S	11 dates: 1-11-08 to 5-19-08	\$1,001 - \$15,000
SP	Citigroup Inc/JMC PC Ret Plan 401K PSP	PS	4 dates: 1-7-08 to 6-10-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000

SP	Clean HBRS Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Cleveland Cliffs Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	CLP Hldgs Spn ADR/JMC PC Ret Plan 401K	S	3 dates: 1-10-08 to 1-29-08	\$1,001 - \$15,000
SP	CNH Global NV/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000

# 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 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, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Comcast Corp CI A/JMC PC Ret Plan 401K	PS	1-8-08P; 4 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	Compass Minerals Intl Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Conocophillips/JMC PC Ret Plan 401K PSP	S	1-7-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	Consol Energy Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Core Laboratories NV/JMC PC Ret Plan 401K	S	03-25-08	\$1,001 - \$15,000
SP	Corinthian Colleges Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Covidien LTD/JMC PC Ret Plan 401K PSP	PS	1-8-08P; 13 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	Crawford & Company CL/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Cree Inc/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Cryolife Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000

# 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 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, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	CSG Systems Intl Inc/ JMC PC Ret. Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	CSX Corp/JMC PC Ret Plan 401K PSP	S	10 dates: 01-15-08 to 03-31-08	\$1,001 - \$15,000
SP	Cubic Corporation Common/JMC PC Ret Plan 401K	S	01-08-08, 03-25-08	\$1,001 - \$15,000
SP	Currency Japanese Yen/JMC PC Ret Plan 401K	S	9-16-08, 9-26-08	\$1,001 - \$15,000
SP	Currency Shares Euro TR/JMC PC Ret Plan 401K	S	9-16-08, 9-26-08	\$1,001 - \$15,000
SP	Cyberonics Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Dai Nippon Printing/JMC PC Ret Plan 401K	S	9-26-08	\$1,001 - \$15,000
SP	Daiwa House Ind Limited/JMC PC Ret Plan 401K	S	4 dates: 1-8-08 to 9-4-08P; 9-26-08S	\$1,001 - \$15,000
SP	Dean Foods Company/JMC PC Ret Plan 401K PSP	PS	6 dates: 1-9-08 to 9-22-08P; 9-16-08, 9-24-08S	\$1,001 - \$15,000
SP	Dell Inc/ JMC PC Ret Plan 401K PSP	PS	12 dates: 1-7-08 to 9-17-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Devry Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Diamond Offshore/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Dresser Rand Group/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	DWS Commodity Secs/John Marshall Collins PC Ret Plan	S	01-23-08	\$15,001 - \$50,000
SP	Dynamic Materials Corp/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	E N I Spa Spons ADR/JMC PC Ret Plan 401K	S	1-29-08	\$1,001 - \$15,000
SP	Eaton Vance Tax Gbl/John Marshall Collins Ret Plan	S	01-18-08	\$1,001 - \$15,000
SP	Eaton Vance Tax Global Buy Write Opportunities Fund/JMC PC Ret Plan 401K PSP	S	09-15-08	\$1,001 - \$15,000
	Eaton Vance Tax Global/WFB IRA C/F Zoe Loifgren	S	09-23-08	\$1,001 - \$15,000
SP	EOG Resources Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Ericsson L M tel Company/JMC PC Ret Plan 401K	PS	3-5-08P; 3 dates: 5-15-08 to 9-26-08S	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

Name Zoe Lofgren

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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, JT	Asset	Type of Transaction	Date	Amount of Transaction
	Evergreen Intl Balanced/MFB IRA C/F Zoe Lofgren	S	09-23-08	\$1,001 - \$15,000
SP	Fannie Mae/JMC PC Ret Plan 401K PSP	PS	9 dates: 1-9-08 to 8-12-08P; 6 dates: 01-23-08 to 09-08-08S	\$1,001 - \$15,000

SP	Faro Technologies Inc/JMC PC Ret Plan 401K	S	01-18-08, 01-22-08	\$1,001 - \$15,000
SP	Finish Line Inc Class A/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Flextronics/JMC PC Ret Plan 401K PSP	PS	5 dates: 1-8-08 to 5-1-08P; 4 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000

SP	Flowserve Corp/John Marshall Collins PC Ret Plan	S	4 dates: 01-18-08 to 09-23-08	\$1,001 - \$15,000
SP	Fluor Corp New/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Fording Candadian Coal/JMC PC Ret Plan 401K	PS	03-25-08P; 07-30-08S	\$1,001 - \$15,000
SP	Freds Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Freeport Moran Copper/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000



# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Fresh Del Monte Produce Inc/JMC PC Ret Plan 401K	PS	03-25-08P; 09-16-08, 09-23-08S	\$1,001 - \$15,000
SP	FTI Consulting Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Fuji Photo Film/JMC PC Ret Plan 401K	PS	3-5-08P; 9-26-08S	\$1,001 - \$15,000
SP	Gamestop Corp New/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	GAP Inc/JMC PC Ret Plan 401K PSP	PS	5 dates: 4-9-08 to 7-15-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	General Electric Company/JMC PC Ret Plan 401K PSP	PS	3 dates: 1-7-08 to 9-17-08S4 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000
SP	General Motors Corp/JMC PC Ret Plan 401K PSP	PS	6 dates: 1-7-08 to 6-3-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000
SP	Genesco Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Geron Corp/John Marshall Collins Ret Plan	S	09-23-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Gibraltar Industries Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Gold Fields Limited New/JMC PC Ret Plan 401K	PS	3 dates: 2-1-08 to 5-22-08P; 3-18-08, 09-26-08S	\$1,001 - \$15,000
SP	Hachijuni Bank LTD ADR/JMC PC Ret Plan 401K	PS	6-25-08, 7-14-08P; 9-26-08S	\$1,001 - \$15,000
SP	Hansen Natural Corp/South Bay Honda	S	03-25-08	\$1,001 - \$15,000
SP	Hess Corporation/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Hewlett-Packard CO/JMC Ret Plan 401K PSP	S	9 dates: 01-23-08 to 09-24-08	\$1,001 - \$15,000
SP	Hibbett Sports Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Hologic Inc/JMC PC Ret Plan 401K PSP	PS	11 dates: 4-25-08 to 9-17-08P; 9-18-08, 9-24-08S	\$1,001 - \$15,000
SP	Home Depot Inc/JMC PC Ret Plan 401K PSP	PS	6 dates: 3-13-08 to 6-11-08P; 3 dates: 9-9-08 to 9-24-08S	\$1,001 - \$15,000
SP	Honeywell Intl Inc/JMC Ret Plan 401K PSP	S	6 dates: 01-23-08 to 09-24-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	HSBC ADR A 6.2%/MFB IRA C/F Zoe Loftgren	S	09-23-08	\$1,001 - \$15,000
SP	Illumina Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Immucor Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Impala Platinum ADR 1/4 SH/JMC Ret Plan 401K	PS	3 dates: 8-11-08 to 9-8-08P; 4 dates: 2-4-08 to 9-26-08S	\$1,001 - \$15,000

SP	Intel Corp/JMC Ret Plan 401K PSP	PS	9-12-08, 9-17-08P; 9-16-08, 9-24-08S	\$1,001 - \$15,000
SP	International Business Machines Corp/JMC Ret Plan 401K PSP	S	8 dates: 01-23-08 to 09-24-08	\$1,001 - \$15,000
SP	Interpublic Group/JMC Ret Plan 401K PSP	S	3 dates: 1-23-08 to 9-24-08	\$1,001 - \$15,000
SP	ISHRS S&P LATN AM/John Marshall Collins Ret Plan	S	01-18-08	\$15,001 - \$50,000
SP	ISHS RSSLL 2000 Grth Index/ IRA/John Marshall Collins	S	01-18-08	\$15,001 - \$50,000
SP	ISHS RSSLL 2000 Val Index/IRA John Marshall Collins	S	1-18-08	\$15,001 - \$50,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	ITT Education Services Inc/JMC PC Ret Plan 401K	PS	09-23-08OP; 4 dates: 01-18-08 to 09-26-08S	\$1,001 - \$15,000
SP	Ivanhoe Mines Limited/JMC Ret Plan 401K	PS	1-11-08, 3-19-09P; 3-5-08, 9-26-08S	\$1,001 - \$15,000
SP	Jo Ann Stores Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Joy Global Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Joy Global Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	JPMORGAN Chase & Co/JMC Ret Plan 401K PSP	S	6 dates: 01-23-08 to 09-24-08	\$1,001 - \$15,000
SP	Juniper Networks Inc/JMC Ret Plan 401K	S	01-18-08, 03-25-08	\$1,001 - \$15,000
SP	Kaman Corporation/JMC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Kansas City Southern/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	KAO Corp Spons ADR/JMC PC Ret Plan 401K	PS	7-9-08P; 8-13-08S	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Kimberly-Clark Corp/JMC Ret Plan 401K PSP	PS	1-25-08, 7-15-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	Kinross Gold Corp No Par/JMC Ret Plan 401K	S	3 dates: 1-3-08 to 2-14-08	\$1,001 - \$15,000
SP	Korea Electric Spons ADR/JMC Ret Plan 401K	PS	3-17-08P; 9-26-08S	\$1,001 - \$15,000
SP	Kraft Foods CI A/JMC Ret Plan 401K PSP	S	3 dates: 1-23-08 to 9-24-08	\$1,001 - \$15,000
SP	KT Corp Spons ADR/JMC Ret Plan 401K	S	1-23-08, 5-19-08P; 9-16-08, 9-26-08S	\$1,001 - \$15,000
SP	La Pac (Louisiana Pacific) Corp/ JMC Ret Plan 401K PSP	PS	1-8-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000
SP	LHIR Gold Limited/JMC Ret Plan 401K	PS	7-29-08P; 3-14-08, 9-26-08S	\$1,001 - \$15,000
SP	Lindsay Corp/JMC PC Ret Plan 401K	PS	03-25-08P; 09-16-08, 09-26-08S	\$1,001 - \$15,000
SP	LKQ Corp/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Lommin PLC ADR New/ JMC Ret Plan 401K	PS	8-1-08, 9-23-08P; 08-06-08, 09-26-08S	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	LSI Corp/JMC Ret Plan 401K PSP	PS	1-8-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000
SP	Macys Inc/JMC PC Ret Plan 401K PSP	PS	6 dates: 1-23-08 to 3-17-08P; 9-16-08, 9-24-08S	\$1,001 - \$15,000
SP	Magna Intl Inc. Class A/JMC Ret Plan 401K	PS	4-29-08, 7-16-08P; 9-16-08, 9-26-08S	\$1,001 - \$15,000
SP	Massey Energy Corp./JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08, 9-26-08S	\$1,001 - \$15,000
SP	Matsushita Elec Ind ADR/JMC Ret Plan 401K	S	7-9-08, 9-26-08	\$1,001 - \$15,000
SP	Mattel Inc/JMC Ret Plan 401K	PS	1-8-08, 6-18-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	McDermott International/JMC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Meadwestvaco Corp/JMC Ret Plan 401K PSP	S	3 dates: 1-23-08 to 9-24-08	\$1,001 - \$15,000
SP	Memc Elect Materials Inc/JMC PC Ret Plan 401K	PS	03-25-08P; 09-05-08S	\$1,001 - \$15,000
	Merrill Lynch & Co PFD	S	09-23-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Millennium Pharm Inc/JMC Ret Plan 401K PSP	S	4 dates: 01-23-08 to 04-14-08	\$1,001 - \$15,000
SP	Mitsui Sumitomo/JMC Ret Plan 401K	S	9-16-08, 9-26-08	\$1,001 - \$15,000
SP	Monsanto Company/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Mosaic Company/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Motorola Incorporated/JMC Ret Plan 401K PSP	PS	4 dates: 1-7-08 to 9-11-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000

SP	NASDAQ OMX Group Inc/JMC Ret Plan 401K	S	3-25-08	\$1,001 - \$15,000
SP	NASDAQ Stock Market/JMC PC Ret Plan 401K	S	1-18-08	\$1,001 - \$15,000
SP	NAVTEQ Corp/JMC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	NEC Electronics/JMC PC Ret Plan 401K	S	8-12-08, 9-16-08	\$1,001 - \$15,000
SP	Netflix Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	New Market Corporation/JMC PC Ret Plan 401K	PS	03-25-08P; 09-16-08, 09-13-08S	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	New York & Company Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Newcrest Mining LTD/JMC PC Ret Plan 401K	PS	8-13-08P; 9-26-08S	\$1,001 - \$15,000
SP	Newmont Mining Corp Hldg/ JMC PC Ret Plan 401K PSP	S	7-9-08, 9-26-08	\$1,001 - \$15,000
SP	Newmont Mining Corp Hldg/ JMC PC Ret Plan 401K PSP	S	1-7-08	\$1,001 - \$15,000
SP	Nexen Inc/JMC PC Ret Plan 401K	PS	8-7-08P; 5-13-08, 9-26-08S	\$1,001 - \$15,000
SP	NII Holdings Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Nippon Tel&Tel Spans ADR/JMC PC Ret Plan 401K	S	4 dates: 6-30-08 to 9-26-08	\$1,001 - \$15,000
SP	NN Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Noble Corporation/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Novagold Res Inc New/JMC PC Ret Plan 401K	S	09-16-08	\$1,001 - \$15,000
SP	NPS Pharmaceutical Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000



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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Nvidia Corp/JMC PC Ret Plan 401K	S	01-18-08, 03-18-08	\$1,001 - \$15,000
SP	Omniceil Inc/JMC PC Ret Plan 401K	S	09-25-08, 10-17-08	\$1,001 - \$15,000
SP	On Assignment Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	One-800 Flowers Com Inc. CL A/John Marshall Collins PC Ret Plan	S	09-25-08, 10-17-08	\$1,001 - \$15,000
SP	Owens Illinois Inc New/JMC PC Ret Plan 401K	S	3 dates: 1-18-08 to 9-18-08	\$15,001 - \$50,000
SP	Pan American Silver/JMC PC Ret Plan 401K	PS	03-25-08P; 09-10-08S	\$1,001 - \$15,000
SP	Parexel Intl Corp/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Park Ohio Hldgs Corp/JMC PC Ret Plan 401K	S	01-18-08, 03-25-08	\$1,001 - \$15,000
SP	Penford Corp/JMC PC Ret Plan 401K	S	01-18-08, 03-25-08	\$1,001 - \$15,000
SP	Penford Corp/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	PepsiAmericas Inc/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Perrigo Company/JMC PC Ret Plan 401K	PS	3-25-08P; 3 dates: 9-16-08 to 9-23-08S	\$1,001 - \$15,000

SP	Petro-CDA/JMC PC Ret Plan 401K	PS	2-13-08P; 5-19-08, 9-26-08S	\$1,001 - \$15,000
SP	Petrochina Company ADR Limit/JMC PC Ret Plan 401K	PS	6-18-08P; 7-23-08S	\$1,001 - \$15,000
SP	PetroHawk Energy Corp/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Pfizer Inc/JMC PC Ret Plan 401K PSP	PS	1-7-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000

SP	Pioneer National Reserve Co./JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Plexus Corp/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Potash Corp Sask Inc/JMC PC Ret Plan 401K	S	03-23-08, 10-17-08	\$1,001 - \$15,000
SP	Powerwave Tech Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Precision Castparts Corp/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Priceline.com Inc New/JMC PC Ret Plan 401K	S	4 dates: 01-18-08 to 09-23-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Promise Co LTD ADR?JMC PC Ret Plan 401K	PS	3-26-08P; 3 dates: 1-1-08 to 09-26-08S	\$1,001 - \$15,000
SP	Quicksilver Resources Inc/JMC PC Ret Plan 401K	PS	03-25-08P; 09-16-08, 09-23-08S	\$1,001 - \$15,000
SP	Qwest Comm Intl Inc/JMC PC Ret Plan 401K	S	4 dates: 1-23-08 to 9-24-08	\$1,001 - \$15,000
SP	Range Resources Corp/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Robbins & Myers Inc/JMC PC Ret Plan 401K	S	4 dates: 1-18-08 to 9-23-08	\$1,001 - \$15,000
SP	Rock Tenn Co CLA/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Royal Dutch Shell ADR B/JMC PC Ret Plan 401K	PS	2-14-08P; 9-16-08, 9-26-08P	\$1,001 - \$15,000
SP	Ryder System Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	S Oil Corp Spons ADR/JMC PC Ret Plan 401K	PS	7-10-08P; 9-18-08S	\$1,001 - \$15,000
SP	Sanofi Aventis/JMC PC Ret Plan 401K	S	4 dates: 4-8-08 to 8-1-08P; 9-16-08, 9-26-08S	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Sara Lee Corp/JMC PC Ret Plan 401K PSP	PS	7 dates: 3-31-08 to 9-11-08P; 9-16-08, 9-24-08S	\$1,001 - \$15,000
SP	Sauer-Danfoss Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Scansource Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Schlumberger LTD/JMC PC Ret Plan 401K	S	01-18-08, 03-25-08	\$1,001 - \$15,000
SP	Sekisui House LTD ADR/JMC PC Ret Plan 401K	PS	3-5-08P; 9-16-08, 9-26-08S	\$1,001 - \$15,000
SP	SHARES TR MSC Emerging Markets Index Fund/ John Marshall Collins PC Ret Plan	S	01-23-08	\$15,001 - \$50,000
SP	Shaw Group Inc/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Shiseido LTD Spons ADR/JMC PC Ret Plan 401K	S	9-16-08, 9-26-08	\$1,001 - \$15,000
SP	Sigma Designs Inc/JMC PC Ret Plan 401K	S	01-18-08, 03-25-08	\$1,001 - \$15,000
SP	SK Telecom LTD Spons ADR/JMC PC Ret Plan 401K	PS	6-6-08P; 9-26-08S	\$1,001 - \$15,000
SP	Societe GENL France ADR/JMC PC Ret Plan 401K	PS	7-1-08, 7-15-08P; 8-6-08, 9-19-08S	\$1,001 - \$15,000

# 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 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, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Sonosite Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Sony Corp/JMC PC Ret Plan 401K PSP	PS	7-14-08P; 4 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	Southern Copper Corp Del/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Statoilhydro ASA/JMC PC Ret Plan 401K	PS	1-29-08, 3-4-08P; 4 dates: 4-10-08 to 4-30-08S	\$1,001 - \$15,000
SP	Stora Enso Corp ADR/JMC PC Ret Plan 401K	PS	4-23-08, 8-6-08P; 9-16-08, 9-26-08S	\$1,001 - \$15,000
SP	Sumitomo Bank LTD/JMC PC Ret Plan 401K	PS	1-11-08, 3-10-08P; 9-26-08S	\$1,001 - \$15,000
SP	Suncor Energy Inc/JMC PC Ret Plan 401K	PS	7-23-08P; 3 dates: 4-15-08 to 9-26-08S	\$1,001 - \$15,000
SP	Sunpower Corp CL A Class/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Swisscom Spons ADR/JMC PC Ret Plan 401K	S	9-16-08, 9-26-08	\$1,001 - \$15,000
SP	Synaptics Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	T D K Corp ADR/JMC PC Ret Plan 401K	PS	6-27-08P; 9-26-08S	\$1,001 - \$15,000
SP	Technip Spors ADR New/JMC PC Ret Plan 401K	PS	1-30-08, 9-8-08P; 9-26-08S	\$1,001 - \$15,000
SP	Tecumseh Products Co/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Tenet Healthcare Corp/JMC PC Ret Plan 401K PSP	PS	3-24-08, 3-25-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000

SP	Thoratec Corp/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Time Warner Inc New/JMC PC Ret Plan 401K PSP	PS	3-11-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000

SP	Toll Brothers Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Tomkins PLC Spors ADR/JMC PC Ret Plan 401K	S	9-26-08	\$1,001 - \$15,000
SP	Toppan Printing Limited/JMC PC Ret Plan 401K	S	9-26-08	\$1,001 - \$15,000
SP	Total S A Spon ADR/JMC PC Ret Plan 401K	S	2-13-08	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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Report any purchases, 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, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Travelers Companies Inc/JMC PC Ret Plan 401K PSP	S	3 dates: 1-23-08 to 9-24-08	\$1,001 - \$15,000
SP	Trex Company Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Tyco Electronics LTD/JMC PC Ret Plan 401K PSP	PS	3-17-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	Tyco Intl LTD New/JMC PC Ret Plan 401K PSP	PS	1-8-08, 9-17-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	UBS AG New/JMC PC Ret Plan 401K	PS	4 dates: 1-17-08 to 6-19-08P; 9-26-08S	\$1,001 - \$15,000
SP	United Therapeutics Corp./JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	UPM Kymmene Corp/JMC PC Ret Plan 401K	S	8-6-08	\$1,001 - \$15,000
SP	Urban Outfitters Inc./JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	UTD Utils Group Spors ADR/JMC PC Ret Plan 401K	S	7-29-08, 9-16-08	\$1,001 - \$15,000
SP	Valassis Communications/JMC PC Ret Plan 401K	PS	03-25-08P; 09-16-08, 09-23-08S	\$1,001 - \$15,000

# 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 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, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Valero Energy Corp/JMC PC Ret Plan 401K PSP	PS	11 dates: 6-19-08 to 9-17-08P; 9-16-08, 9-24-08S	\$1,001 - \$15,000
SP	Valmont Industries Inc/JMC PC Ret Plan 401K	S	1-18-08, 3-25-08	\$1,001 - \$15,000
SP	Varian Med Syst Inc Systems/JMC PC Ret Plan 401K	PS	03-25-08P; 09-16-08, 09-23-08S	\$1,001 - \$15,000
SP	Vodafone GRP PLC New ADR/JMC PC Ret Plan 401K	S	9-26-08	\$1,001 - \$15,000
SP	WACOAL Holdings Corp ADR/JMC PC Ret Plan 401K	S	9-16-08, 9-26-08	\$1,001 - \$15,000
SP	Wal-Mart Stores Inc/JMC PC Ret Plan 401K	PS	3-25-08P; 9-16-08, 9-23-08S	\$1,001 - \$15,000
SP	Warner Music Group Corp./JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Waste Management Inc Del/JMC PC Ret Plan 401K PSP	PS	9-17-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	Watson Pharmaceuticals/JMC PC Ret Plan 401K PSP	PS	5 dates: 1-7-08 to 5-14-08P; 3 dates: 01-23-08 to 09-24-08S	\$1,001 - \$15,000
SP	Wells Fargo & Co Cash SWENWF Advantage Money Market	P	Various Dates	\$500,001 - \$1,000,000



# 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 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, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Wells Fargo & Co. New/John Marshall Collins	S	9-23-08	\$15,001 - \$50,000
SP	Wells Fargo Bank Stock/John Marshall Collins Ret Plan	S	9-23-08	\$15,001 - \$50,000
SP	Western Digital Corp/JMC PC Ret Plan 401K	S	4 dates: 1-18-08 to 9-23-08	\$1,001 - \$15,000
SP	Wet Seal Inc Class A/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000
SP	Whole Foods/JMC PC Ret Plan 401K PSP	PS	5 dates: 1-7-08 to 5-14-08P; 3 dates: 1-23-08 to 9-24-08S	\$1,001 - \$15,000
SP	Xerium Technologies Inc/JMC PC Ret Plan 401K	PS	9-23-08P; 9-26-08S	\$1,001 - \$15,000

# SCHEDULE VIII - POSITIONS

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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
Member	Santa Clara University School of Law Board of Visitors
Member	Santa Clara University School of Law Dean's High Tech Advisory Council
Ex Officio Board Member	The Tech Museum of Innovation
Honorary Board	Viet Heritage Society
Advisory Board	Silicon Valley Education Foundation
Advisory Board	Santa Clara Computer & High Technology Law Journal; Santa Clara School of Law
Bay Area Board of Advisors	Pacific Community Ventures

# 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
1981 to Present	California Public Employees Retirement System (through County of Santa Clara)	Continuing Membership (vested), no continuing contribution by employer or employee
1981 to Present	Wells Fargo Bank & ICMA (through County of Santa Clara)	Savings Plan, no contributions by employer or employee