



Filing ID #10004745

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Mr. Rush Holt  
**Status:** Former Member  
**State/District:** NJ12

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2015  
**Filing Date:** 02/1/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bristol-Myers Squibb Company (BMY)	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Community Bank	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Bank Acct.					
Congressional Credit Union	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Checking and savings					
Edna and William Froelich Trust		None	Farm income	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Minonk, Woodford County, IL, US					
DESCRIPTION: Family farm					
Fidelity Mutual Fund FBALX	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Inherited Roth IRA acquired in rollover of Inherited Fidelity SPAXX Roth IRA					
Fidelity Vanguard 2025 Mutual Fund VTTVX	SP	\$1,000,001 - \$5,000,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Spouse retirement fund					
Froelich Land Trust		None	Farm income	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Income interest in family farm in Livingston County, IL, Township 27, range 3, section 28, not ownership interest					
iShares Core S&P Total U.S. Stock Market ETF (ITOT)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Lancefield Farm	SP	\$100,001 - \$250,000	Farm income	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Amity, Yamhill County, OR, US DESCRIPTION: Family farm					
Rental cabins, 91 Old Hawkeye Rd	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: AuSable Forks, Clinton County, NY, US					
Rental House, Pennington Rocky Hill	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Pennington, Mercer County, NJ, US					
TIAA/CREF 403(b)	SP	\$100,001 - \$250,000	Required minimum distribution	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: spouse reitirement account					
TIAA/CREF 403(b)		\$250,001 - \$500,000	Tax-Deferred	None	<input type="checkbox"/>
DESCRIPTION: RH retirement account					
Transamerica Vanguard VTTVX Retirement 403(b)	SP	\$1,000,001 - \$5,000,000	Required minimum distribution	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Spouse retirement account					
U.S. Bancorp (USB)	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard 2010 VTXVX Retirement 401(k)		\$100,001 - \$250,000	Tax-Deferred	None	<input type="checkbox"/>
DESCRIPTION: RH retirement account					
Wells Fargo Bank	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Checking and Savings					

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Government Money Market Inherited Roth IRA DESCRIPTION: Rolled over into Fidelity mutual fund FBALX	SP	09/16/2014	E	\$15,001 - \$50,000	
Fidelity Vanguard 2025 Mutual Fund VTTVX DESCRIPTION: Rollover of defined benefit pension to mutual funds IRA	SP	02/3/2014	E	\$1,000,001 - \$5,000,000	
iShares Core S&P Total U.S. Stock Market ETF (ITOT)	SP	09/16/2014	P	\$1,001 - \$15,000	
Zimmer Holdings, Inc. (ZMH) DESCRIPTION: Donation of stock to Princeton Area Community Foundation	SP	09/16/2014	S	\$1,001 - \$15,000	<input type="checkbox"/>

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Princeton Healthcare Affiliated Physicians	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Bank	March 2007	Home equity line of credit	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Carnegie Institution for Science

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2014	R. Holt and American Association for the Advancement of Science	Contract for employment to begin February 2015

SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details				Inclusions		
Source	Start Date	End Date	Itinerary	Lodging?	Food?	Family?
J Street Education Fund	05/9/2014	05/16/2014	Newark, NJ - Tel Aviv, Israel - Jerusalem, Israel - Newark, NJ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alliance for Health Reform	02/28/2014	03/2/2014	Newark, NJ - Houston, TX - Newark, NJ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Congressional Progressive Caucus	02/6/2014	02/8/2014	Pennington, NJ - Philadelphia, PA - Pennington, NJ	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## COMMENTS

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Mr. Rush Holt , 02/1/2015