the onse.	vered and Yes" respo	Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.	<b>§</b>	Yes X No	V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period? If yee, complete and attach Schedule V.
×	Yes	IX. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule IX.	S	Yes X No	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? If yes, complete and attach Schedule IV.
No	Yes X No	Vill. Did you hold any reportable positions on or before the date of filling in the current calendar year?  If yes, complete and attach Schedule VIII.		Yes	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	VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$350 from one source)?  If yes, complete and attach Schedule VII.	×	Yes	<ol> <li>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?</li> <li>If yes, complete and attach Schedule II.</li> </ol>
×	Yes	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.	O <sub>N</sub>	Yes X	<ol> <li>Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period?</li> <li>If yes, complete and attach Schedule I.</li> </ol>

# EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION — ANSWER EACH OF THESE QUESTIONS

×	Yes	<b>EXEMPTION</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 Ethics.
×	Yes	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?
× ×	S. S.	IPO—Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Name Joseph P. Kennedy III

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### SCHEDULE I—EARNED INCOME

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totalling \$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. See examples below.

Exclude: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

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Source	Туре	Amount
Keene State	Approved Teaching Fee	\$6,000
State of Maryland	Legislative Pension	\$9,000
be (Oct. 2nd)	Spouse Speech	\$1,000
ion	Spouse Salary	NA.
Commonwealth of Massachusetts, Boston, MA *	Salary	\$ 3,386
(Middlesex District Attorney's Office)		
National Abortion and Reproductive Rights Action League, Washington, DC	Spouse Salary	n/a
President and Fellows of Harvard College, Cambridge, MA	Spouse Salary	n/a
Boston Medical Center, Boston, MA	Spouse Consulting	\$ 67,315
Harvard University, Cambridge, MA	Spouse Consulting	\$ 3,239
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* Filer is no longer employed.		

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Page 3 of 33

## SCHEDULE II—PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of an honorarium. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Ethics. A green envelope for transmitting the list is included in each Member's filing package.

Source Association of American Associations, Washington, DC	Activity	<b>Date</b> Feb. 2, 2012	Amount
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Name Joseph P. Kennedy III

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L				<u> </u>	<del> </del>	╁┈		Ľ	<u>8</u>	<b>%</b>	Exclude: Your personal residence, including second homes and vacation homes (unless there was retail income during the reporting period); any deposits totaling be second. It is a federal retirement personal checking or saving accounts; and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.  If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC), or is jointly held with your spouse (JT), in the optional column on the far left.  For a detailed discussion of Schedule III requirements, please refer to the instruction booklet.	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 loca-	For all IfAAs and other retirement plans (such as 401(s) plans) provide the value for each asset held in the account that exceeds the reporting thresholds.  For rental or other real property held for investment, provide a complete address or a description, e.g., "rental property," and a city and state.	Provide complete names of stocks and mutual funds (do not use ticker symbols.)	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 sources of income which generated more than \$200 in "uneamed" income during the year.			SCHEDOLE III - ASSETS AND CHEATINED INCOME
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End of SMART Plan
For additional assets and unearned income, use next page.

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SCHEDULE III—ASSETS AND "UNEARNED" INCOME Joseph P. Kennedy III Page 6 of 33

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Continuation Sheet (if needed)

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\* Filer is a discretionary beneficiary and has never received any income from this trust. Filer has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

Continuation Sheet (if needed) SCHEDULE III—ASSETS AND "UNEARNED" INCOME 8 É SP Oracle Corp. Com Occidental Pete Corp. Com Novartis AG-ADR Nestle SA Sponsored ADR Mosanto Co. Microsoft Corp. Com MetLife Inc. McDonalds Corp. Com Kinder Morgan JP Morgan Chase & Co. Com Honeywell Intl. Inc. Google Inc. A General Electric Co. General Dynamics Corp. ECOLAB Inc. Com Disney Co. Johnson Controls Inc. Com Johnson & Johnson Com Asset and/or Income Source BLOCK A (Sold × > None В \$1 -- \$1,000 × n × \$1,001 - \$15,000 ×× × O × × × \$15,001 - \$50,000 Value of Asset E F × × \$50,001 - \$100,000 Year-End BLOCK B \$100,001 - \$250,000 \$250,001 - \$500,000 \$500,001 - \$1,000,000 \$1,000,001 - \$5,000,000 ے \$5,000,001 - \$25,000,000 ㅈ \$25,000,001 - \$50,000,000 \_ Over \$50,000,000 ₹ Spouse/DC Asset over \$1,000,000\* NONE DIVIDENDS RENT of Income BLOCK C Type INTEREST CAPITAL GAINS **EXCEPTED/BLIND TRUST** TAX-DEFERRED Other Type of Income (Specify: e.g., Partnership Income or Farm Income) Joseph P. Kennedy III None \$1 - \$200 = = Amount of Income \$201 - \$1,000 ₹ \$1,001 - \$2,500 V VI VII VIII IX BLOCK D \$2,501 - \$5,000 \$5,001 - \$15,000 \$15,001 - \$50,000 \$50,001 - \$100,000 \$100,001 - \$1,000,000 \$1,000,001 - \$5,000,000 × × Over \$5,000,000 Page × Spouse/DC Income over \$1,000,000\* fransaction BLOCK E ထ 233 ரைவுள ס T O σ S

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BLOCK E Transaction	BLOCK D Amount of Income	вьоск с	BLOCK B  Year-End	BLOCK A Asset and/or Income Source
Page 9 of 33	Joseph P. Kennedy III	Name Jos	"UNEARNED" INCOME	SCHEDULE III—ASSETS AND "UNEARNED" INCOME Continuation Sheet (if needed)

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Abbott Labs (Sold)	ock(Sold)	BNY Mellon Midcap Stock (Sold)	BNY Mellon Intl Fund (Sold)	SSGA Inst US Treas MM INV(Sold)	Assets include:	FBO Sheila R. Kennedy	Trust U/W Rudolph S. Rauch *		Frances 8. Rauch	END of Trust U/IND	Wells Fargo Co.	Waste Mgmt Inc. Del Com	WalMart Stores Inc. Com	Vodaphone Group PLC ADR	Verizon Communications Inc.(Sold)	United Parcel Service CL B	Texas instruments inc. Com	Suncor Energy Inc.	Schlumberger Ltd	Sanofi-Aventis AR		BLOCK A Asset and/or Income Source
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\*Represents a distribution to Filer from Trust U/W Rudolph S. Rauch. Trust sold all of its assets and terminated December 2012. There are no remaining assets in this Trust..

**SCHEDUL**Continuation

JLE III — ASSETS AND ion Sheet (if needed)	JLE III—ASSETS AND "UNEARNED" INCOME ion Sheet (if needed)	Name Joseph P. Ko	ennedy III	Page 10 of 33
BLOCK A et and/or income Source	BLOCK B Year-End	вьоск с <b>Туре</b>	BLOCK D Amount of Income	BLOCK E

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up Inc.	Suncor Energy Inc.	ntis AR	Qualcomm	Plum Creek Timber Co. Inc.	Omnicom Group Inc.	Occidental Pete Corp. Com (Sold)	Nestle SA Sponsored ADR	Monsanto Co.	Microsoft Corp. Com	Merck and Co. Inc.	MetLife Inc.	McDonalds Corp. Com	Marriott Intl. Inc. A.	HJ Heinz Co.	Google Inc. A.	General Electric Co.	Exxon Mobil	Disney Co.	Chubb Corp. Com	Anheuser Busch		Asset and/or income Source
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CHEDULE III—ASSETS AND "UNEARNED" INCOME ontinuation Sheet (if needed)	UNEARNED" INCOME	Name Joseph F	<sup>5</sup> . Kennedy III	Page 11 of 33
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Asset and/or Income Source						United Technologies Corp (Sold)	Verizon Communications Inc. (Sold	Wal Mart Stores Inc. Com (Sold)	Kinder Morgan (Sold)	END of Trust U/W	Rudolph S. Rauch	Tax Exempt Trust U/W of	Francis B. Rauch f/b/o	Sheila Rauch Kennedy and	Her Descendants *	Assets include:	State Street Bank & Trust	BrandyTrust Multi-Strategy	Common Trust Fund	BrandyTrust Structured Index Fo	BrandyTrust Global Common	Trust Fund	BrandyTrust Special Equities	Partners, LP	END of Trust U/W of	Francis B. Rauch
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\* Filer is a discretionary beneficiary and has never received any income from this trust. Filer has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

SCHEDULE III—ASSETS AND "UNEARNED" INCOME Continuation Sheet (if needed) Name Joseph P. Kennedy III Page 13 of 33

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\* Represents a distribution to filer from Eleanor G. Brewster Trust U/A dated 12/19/36. Filer has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

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SCHEDULE III—ASSETS AND "UNEARNED" INCOME Continuation Sheet (if needed)

Name Joseph P. Kennedy III Page 16 of 33

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Continuation Sheet (if needed)

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Continuation Sheet (if needed)

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Name Joseph P. Kennedy III	
Page 20 of 33	

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\* Filer is a discretionary beneficiary and has never received any income from this trust. Filer has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

Joseph P. Kennedy III

Continuation Sheet (if needed) 8 4 Ş Asset and/or Income Source Verizon Communications (Sold) Sysco Corp. Schlumberger Ltd Qualcomm inc. Plum Creek Timber Co. Inc. Oracle Systems Corp. Wal Mart Stores Mondelez Intl. Kinder Morgan Inc. Google Inc. Gilead Sciences Inc. General Electric Co. Monsanto Company McDonalds Corp. Linear Technology Corp Johnson & Johnson First Repubic Bank San Fran Microsoft Corp. MetLife Inc. Johnson Controls Inc. Intel Corp. (Sold) × None Œ \$1 - \$1,000 × Ô × \$1,001 - \$15,000 DEFGH × ×× × × × × × \$15,001 - \$50,000 Value of Asset  $\overline{\mathbf{x}}$ × × \$50,001 - \$100,000 × Year-End BLOCK B \$100,001 - \$250,000 × \$250,001 - \$500,000 \$500,001 - \$1,000,000 \$1,000,001 - \$5,000,000 چ \$5,000,001 - \$25,000,000 × \$25,000,001 -- \$50,000,000 Over \$50,000,000 Spouse/DC Asset over \$1,000,000\* Z NONE DIVIDENDS RENT of Income BLOCK C INTEREST Type **CAPITAL GAINS** EXCEPTED/BLIND TRUST TAX-DEFERRED Other Type of Income (Specify: e.g., Partnership Income or Farm Income) None \$1 - \$200 Amount of Income \$201 - \$1,000 \$1,001 - \$2,500 \$2,501 - \$5,000 BLOCK D \$5,001 - \$15,000 \$15,001 - \$50,000 \$50,001 -- \$100,000 \$100,001 - \$1,000,000 × \$1,000,001 - \$5,000,000 × Over \$5,000,000 Page 21 of 33 Spouse/DC Income over \$1,000,000\* S(Partial) S(Partial) Transaction BLOCK E ரை ஒர Q T S ഗ T V

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	Vanguard Star Fund	Vanguard (IRA) sole asset:	Lincoln National Life Ins. Co. *	US Treas. Bonds & Obligations	Wells Fargo Bank Accounts	Bank of America Checking Acct	U/W of George S. Brewster	END of Residuary Trust	BrandyTrust SPJ, LLC		BrandyTrust Special Equities	_	BrandyTrust Multi Strategy	BrandyTrust Global Com Tr Fd	Vodafone Group Spons. ADR	Novartis AG ADR	Nestie SA Sponsored ADR	BHP Ltd. Sponsored ADR	Wells Fargo and Company	Waste Management Inc. Del		Asset and/or Income Source	
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\* Retirement Plan. Direct rollover to item 19 listed below.

Name Joseph P. Kennedy III Page 23 of 33

Report any dependent held for invi	Report any purchase, sale, or exchange transactions by you, your spouse, or dependent child during the reporting period of any security or real property held for investment that exceeded \$1,000, include transactions that resulted	by you, your spouse, or security or real property ansactions that resulted	of I	Type of Transaction	tion		Date			, l	<b>3</b>	nt o	f Tra	nsac	Amount of Transaction	_		
in a capital Exclude trai purchase o	in a capital loss. Provide a brief description of any exchange transaction. Exclude transactions between you, your spouse or dependent children, or the purchase or sale of your personal residence, unless it generates rental	exchange transaction. pendent children, or the ess it generates rental	:		:	Capital ded \$200	(MO/DAY/YR)	>	₽	ဂ	0	П	π	G	Ξ	-	ے	~
income. If a	income. If only a portion of an asset is soid, please so indicate (i.e., "par- tial sale"). See example below.	so indicate (i.e., "par-	HASE		ANGE		Or Quarterly, Monthly or							1	0			
Capital Gal \$200, ched	Capital Gains — if a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box and disclose this income on Schedule III.	capital gain in excess of income on Schedule III.	PURCI	SALE	EXCH/		Bi-weekly, if applicable	01- 000	000	001- 0,000	),001- ),000	),001- ),000	),001- 00,000	00,001 00,000	00,001 000,00	00,000	000,000	\$1,000,00 ##/DC A
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SP	Example: Mega Corporation Common Stock (partial sale)	ion Stock (partial sale)		×			10-12-12		×			Ц			Ц	Ц	Ц	
1	Agilent Technologies Inc.	(page 5, item 5)	×				08-23-12	×										
	Anheuser Busch	(page 5, item 6)	×				02-27-12	×										
	BHP Billiton Ltd	(page 5, item 8)		×		×	08-23-12	×										,
	CVS/Caremark Corp.	(page 5, item 10)	×				08-07-12	×										
	Cypress Semiconductor	(page 5, Item 11)	×				08-07-12	×										
	Exxon Mobil Corp.	(page 5, item 15)		×		×	08-07-12	×										Ţ
	Gilead Sciences Inc.	(page 5, item 17)	×				08-07-12	×										
	JP Morgan Chase & Co.	(page 5, item 21)		×		×	08-07-12	×										
	Johnson & Johnson	(page 6, item 1)	×		·		02-27-12	×										
	MedTronic Inc.	(page 6, item 4)		×		×	08-07-12	×										
	Monsanto Co.	(page 6, item 7)		×		×	08-23-12	×					,					
	Occidental Pete Corp.	(page 6, item 10)		×		×	08-23-12	×										
	Pepsico Inc.	(page 6, item 12)		×		×	02-27-12	×										
	Qualcomm Inc.	(page 6, item 14)	×				08-23-12	·×										
	Sanofi-Aventis	(page 6, item 15)	×				02-27-12	×										
	Schlumberger Ltd	(page 6, item 16)		×		×	08-23-12		×									

Joseph P. Kennedy III Page 24 of 33

Report any dependent held for inv	Report any purchase, sale, or exchange transactions by you, your spouse, or dependent child during the reporting period of any security or real property held for investment that exceeded \$1,000, include transactions that resulted	y you, your spouse, or scurity or real property reactions that resulted	of Tr	Type of Transaction	ction	0	Date			<b>&gt;</b>	Amount	nt o	ğΤr:	ınsa	of Transaction	_		
Exclude trapurchase of	in a capital loss. Provide a brief description of any exchange transaction. Exclude transactions between you, your spouse or dependent children, or hall purchase or sale of your personal residence, unless it generates rental income if not a personal residence.	exchange transaction.  endent children, or the ss it generates rental and the following transport of t	E	i	E	if Capita ded \$20	(MO/DAY/YR)	>	00	ი	0	m	TI	Q	I	***	۴.	~
income. If o	income. If only a portion of an asset is sold, please so indicate (i.e., "par- tial sale"). See example below.	so indicate ( <i>i.e.</i> , "par-	CHASE	E	HANGE	k Box if Exceed	Quarterly, Monthly, or							01- 00				-
Capital Ga \$200, ched	Capitel Gains — if a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box and disclose this income on Schedule III.	apital gain in excess of scome on Schedule III.	PURC	SALE	EXCH	Check Gain E	Bi-weekly, if applicable	001- ,000	,001- ,000	,001- 0,000	0,001- 60,000	60,001- 0,000	0,001- 000,000	000,000 000,000	,000,00°	,000,00 ,000,0	0,000,0	(\$1,000,0 >USO/DC
* This colur	This column is for assets solely held by your spouse or dependent child	or dependent child.						\$1, \$15						\$1, \$5,			1	1
SP, DC, JT	Asset  Asset	n Shock (nartial cala)		<			10 10											
	ሞ !	(page 6, item 17)		×			05-30-12	×										
	Sysco Corp.	(page 6, item 18)		×			02-27-12	×										
	United Parcel Service CL B	(page 6, item 20)	×				08-07-12	×										
	Verizon Communications	(page 7, item 1)		×		×	08-07-12	×										
	Vodaphone Group PLC	(page 7, item 2)	×				08-23-12	×										
	Wal Mart Stores Inc.	(page 7, item 3)		×	·	×	5-30&8-19-12	×										
	General Dynamics Corp.	(page 8, item 3)		×		×	03-01-12			×								<u> </u>
	Johnson & Johnson	(page 8, item 8)	×				03-01-12	×										
	Kinder Morgan	(page 8, item 10)	×				08-10-12	×										
	Monsanto Co.	(page 8, item 14)	×				03-01-12	×										
	Nestle SA Sponsored	(page 8, item 15)	×				03-01-12	×										
	Sanofi-Aventis AR	(page 9, item 1)	×				03-01-12		×			<u></u>						
	Verizon Communications	(page 9, item 6)		×		×	08-10-12	×										
	BNY Melion Intl Fund	(page 9, item 18)		×			12-20-12		×									
	BNY Mellon Mid Cap Stock	(page 9, item 19)		×		×	12-20-12		×									
	BNY Meilon Small Cap Stock	(page 9, item 20)		×			12-20-12	×										

Name Joseph P. Kennedy III Page 25 of 33

Report any dependent held for inv	Report any purchase, sale, or exchange transactions by you, your spouse, or dependent child during the reporting period of any security or real property held for investment that exceeded \$1,000, Include transactions that resulted	ns by you, your spouse, or security or real property transactions that resulted	of Tra	Type of Transaction	ction		Date			A	mot	ınt c	of Tra	Amount of Transaction	ction	_		
in a capita Exclude tra purchase of income. If of tial sale").	in a capital loss. Provide a brief description of any exchange transaction. Exclude transactions between you, your spouse or dependent children, or the purchase or sale of your personal residence, unless it generates rental income. If only a portion of an asset is sold, please so indicate (i.e., "par- tial sale"). See example below.	ny exchange transaction. bependent children, or the nless it generates rental se so indicate (i.e., "par-	HASE		NGE	Box if Capital xceeded \$200	(MO/DAY/YR) or Quarterly,	<b>&gt;</b>	8	C	0	Œ	71	ិ		1- 0		
Capital Ga \$200, ched	Capital Gains — if a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box and disclose this income on Schedule III.	a capital gain in excess of is income on Schedule III.	PURC	SALE	EXCH/		Bi-weekty, if applicable	01- 000	001- 000	001- 0,000	0,001- 0,000	0,001- 0,000	0,001-	00,001	00,001 000,00	000,000	,000,00	\$1,000,0 use/DC A
• This colur	This column is for assets solely held by your spouse or dependent child	use or dependent child.						\$1,0 \$15,	\$15, \$50,	\$50 \$10				\$1,0 <b>\$</b> 5,0		\$25 \$50		
SP. DC, JT	Asset																	
SP	Example:	Mega Corporation Common Stock (partial sale)		×			10-12-12		×				Г					
	Abbott Labs	(page 9, item 21)		×		×	12-24-12		×									
	Anheuser Busch	(page 10, item 1)		×		×	12-24-12	×		,								
	Anheuser Busch	(page 10, item 1)	×				03-01-12	×										
	Chubb Corp Com	(page 10, item 2)		×		×	03-01-12		×									
	Chubb Corp Com	(page 10, item 2)		×		×	12-24-12		×									
	Disney Co.	(page 10, item 3)		×		×	12-24-12	×										
	Disney Co.	(page 10, item 3)	×				03-01-12	×										
	Exxon Mobil Corp.	(page 10, item 4)		×		×	12-24-12		×									
	General Electric Co.	(page 10, item 5)		×		×	12-24-12	×										
	Google Inc. A	(page 10, item 6)		×		×	12-24-12	×										4
	HJ Heinz Co.	(page 10, item 7)		×		×	12-24-12	×									,	
	Marriott Intl. Inc. A	(page 10, item 8)		×		×	03-01-12	×										
	Marriott Intl. Inc. A	(page 10, item 8)		×		×	12-24-12	×										
	McDonalds Corp Com	(page 10, item 9)		×		×	12-24-12	×										
	McDonalds Corp Com	(page 10, item 9)	×				03-01-12	×										
	MetLife Inc.	(page 10, item 10)		×			12-24-12	×										

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Report any dependent held for inve	Report any purchase, sale, or exchange transactions by you, your spouse, or dependent child during the reporting period of any security or real property held for investment that exceeded \$1,000, Include transactions that resulted	by you, your spouse, or security or real property ansactions that resulted	of Tra	Type of Transaction	tion		Date			D I	E E	Ħ,	of Tra	ınsa	Amount of Transaction	٦		
in a capital Exclude train purchase of income. If of tial sale").	in a capital loss. Provide a brief description of any exchange transaction. Exclude transactions between you, your spouse or dependent children, or the purchase or sale of your personal residence, unless it generates rental income if only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.	exchange transaction. pendent children, or the ess it generates rental so indicate (i.e., "par-	HASE		ANGE	Box if Capital xceeded \$20	(MO/DAY/YR) or Quarterly, Monthly, or	>	89	ი	Ö	m	म	<u>.</u>		11- 0 —		
Capital Gains - \$200, check the	Capital Gains — if a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box and disclose this income on Schedule III.	capital gain in excess of income on Schedule III.	PURC	SALE	EXCH		Bi-weekly, if applicable	001- 5,000	,001- ,000	,001- 10,000	0,001- 60,000	-100,00 0,000	00, <b>0</b> 01- 000,000	000,001 000,000	000,001 5,000,00	00,000,i 00,000,i	00,000,0	c \$1,000,00 ouss/DC A:
	This column is for assets sowey nero by your shouse or dependent chird	e or dependent chilo.						\$1	\$5					\$1 \$5		\$2 \$5		
SP	Example: Mega Corporation Common Stock (partial sale)	on Stock (partial sale)		×			10-12-12	Ц	×									Ш
	Merck and Co. Inc.	(page 10, item 11)		×		×	12-24-12		×									•
	Microsoft Corp. Com	(page 10, item 12)		×		×	12-24-12	×										
	Monsanto Co.	(page 10, item 13)		×		×	12-24-12	×										
	Mosanto Co.	(page 10, item 13)	×				03-01-12	×										<u> </u>
	Nestle SA Sponsored ADR	(page 10, item 14)		×		×	12-24-12	×										
	Nestle SA Sponsored ADR	(page 10, item 14)	×				03-01-12	×										
	Occidental Pete Group Corp Com(page 10, item 15	om(page10, item15)		×			12-24-12	×										
	Omnicom Group Inc.	(page 10, item 16)		×		×	03-01-12	×										
	Omnicom Group Inc.	(page 10, item 16)		×		×	12-24-12	×										
	Plum Creek Timber Co. Inc.	(page 10, item 17)		×		×	12-24-12	×										
	Plum Creek Timber Co. Inc.	(page 10, item 17)	×				03-01-12	×		<u> </u>	<u> </u>							<u> </u>
	Qualcomm	(page 10, item 18)		×		×	12-24-12		×									
	Sanofi-Aventis AR	(page 10, item 19)		×		×	12-24-12	×										
	Sanofi-Aventis AR	(page 10, item 19)	×				03-01-12	×										
	SunCor Energy Inc.	(page 10, item 20)		×			12-24-12	×										
	T Rowe Price Group Inc.	(page 10, item 21)		×		×	12-24-12	×										

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al 000
dependent child during the reporting period of any security or real property of Transaction Date Amount of Transaction

Name Joseph P. Kennedy III Page 28 of 33

Report any dependent held for inv	Heport any purchase, sale, or exchange transactions by you, your spouse, or dependent child during the reporting period of any security or real property held for investment that exceeded \$1,000, include transactions that resulted	of Th	Type of Transaction	ši On		Date			<b>。</b>	Amount of	ž		Transaction		³		
in a capita Exclude tra purchase of income. If of the leafers	in a capital loss. Provide a brief description of any exchange transaction. Exclude transactions between you, your spouse or dependent children, or the purchase or sale of your personal residence, unless it generates rental income. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.	ASE		NGE	ox if Capital ceeded \$200	(MO/DAY/YR) or Quarterly,	>	В	ဂ	0		'n	Ð	I		و	-
Capital Ga \$200, chec	Capital Gains — if a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box and disclose this income on Schedule III.	PURC	SALE	EXCH/		Bi-weekly, if applicable	01- 000	001- 000	001- 0,000	0,001- 0,000	0,001- 0,000	0,001 <i>-</i> 00,000	00,001 00,000	00,001 000,00	000,00 000,00	r ,000,00	\$1,000,01 A DC\eet
* This colu	This column is for assets solely held by your spouse or dependent child.		;				\$1,0 \$15,	\$15,0 \$50,0					\$1,0 \$5,0			Ove \$50,	
SP, DC, J1																	
Sp	Example:   Mega Corporation Common Stock (partial sale)		×			10-12-12		×						Γ			
	Kinder Morgan (page 14, item 12)	×				12-24-12		×									
	Mondelez Intt. (page 14, item 17)	×				12-24-12		×									
	Verizon Communications Inc. (page 15, item 5)		×		×	08-07-12		×				4"					
	Vodaphone Group PLC (page 15, item 10)	×				02-27-12		×	•								
	Eaton Vance Small Cap Fund I (page 17, item 10)	×				12-27-12	×										
	Accenture PLC Ireland (page 17, item 11)	×				12-24-12	×										
	Anheueser Busch (page 17, item 13)	×				12-24-12	×			!							
ı	First Republic Bank San Fran (page 17, item 21)	×				12-24-12	×										
	General Electric Co. (page 18, item 1)		×		×	12-24-12		×									
	Gilead Sciences Inc. (page 18, item 2)	×				12-24-12	×										
	Kinder Morgan (page 18, item 5)	×				08-07-12	×					<u> </u>					
	Kinder Morgan (page 18, item 5)	×				12-24-12	×										
_	Sysco Corp. (page 18, item 18)		×			02-27-12	×										
	Sanofi-Aventis Sponsored ADR (page 19, item 5)	×				02-27-12	×										
	Verizon Communications (page 18, item 20)		×		×	08-07-12	×										
	Intentionally left blank																

SCHEDULE IV— TRANSACTIONS Name Joseph P. Kennedy III Page 29 of 33

Report any dependent held for invine the formal in a capital Exclude trail purchase o income. If o tall sale").  Capital sale").  Capital Gal \$200, check  This colum SP, DC, JT SP	a cas Selica	whange transactions writing period of any sed \$1,000. Include trased \$1,000. Include trased spouse or day our spouse or day our spouse or day y held by your spouse y held by your spouse Asset a Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Commit as Corporation Corporation Corporation Corporation Corporation Corporation Committee Corporation Corporatio	by you, your spouse, or ecurity or real property insactions that resulted exchange transaction, or the text generates rental so indicate ( <i>i.e.</i> , "parapital gain in excess of income on Schedule III. or dependent child.  on Stock (partial sale) (page 20, item 10) (page 20, item 13) (page 20, item 18) (page 20, item 21) (page 21, item 1) (page 21, item 1)	× × × × PURCHASE	× × × × PURCHASE  SALE  EXCHANGE	EXCHANGE S	Check Box if Capital Gain Exceeded \$200		\$1,001- \$15,000	X X X X 350,000	× \$50,001- \$100,000 O	S100,001-   \$250,000   m   O	\$250,001- \$500,000 m	\$500,001-	\$1,000,001- \$5,000,000 ຄ ຊື່	\$5,000,001- \$25,000,000 I	\$25,000,001- \$50,000,000	Over \$50,000,000 C	. (Spouse/OC Asset)
	First Rep	ublic Bank San Fran	(page 21, item 1)	×				12-24-12		×									
	General I	General Electric Co. (partial sale Gilead Sciences Inc.	e)(page 21, item 2) (page 21, item 3)	×	×		×	12-24-12 12-24-12		×	×								•
	Johnson	Johnson & Johnson (partial sale) (page 21, item 6	) (page 21, item 6)		×		×	12-24-12			×	<u> </u>							
	Kinder Morgan	organ organ	(page 21, item 8) (page 21, item 8)	××				08-07-12 12-24-12	×	×				l .					
	Mondelez inti	z inti	(page 21, item 13)	×				12-24-12		×						:			
	Sysco Corp	ур.	(page 21, item 19)		×			02-27-12	×										
	Verizon (	Verizon Communications	(page 21, item 20)		×		×	08-07-12	×		ļ								
	Vodapho	Vodaphone Group PLC	(page 22, item 6)	×				02-27-12		×					ļ		ļ	ļ	
	Fidelity E	Fidelity Equity Income Fund	(page 5, item 1)		×			07-02-12	×										Ŀ

Name Joseph P. Kennedy III

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30

SP, DC, JT SP Capital Gains — if a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box and disclose this income on Schedule III. tial sale"). See example below. purchase or sale of your personal residence, unless it generates rental income. If only a portion of an asset is sold, please so indicate (i.e., "parin a capital loss. Provide a brief description of any exchange transaction. Exclude transactions between you, your spouse or dependent children, or the Report any purchase, sale, or exchange transactions by you, your spouse, or dependent child during the reporting period of any security or real property held for investment that exceeded \$1,000. Include transactions that resulted This column is for assets solety held by your spouse or dependent child. Asset

Example: Mega Corporation Common Stock (partial sale) T. Rowe Price Structured Research SSgA Russell Small Cap Index Fidelity Equity Income Fund Fidelity Equity Income Fund Common Trust Fund Sec Lnd Ser 1 (page 5, item 1) (page 5, item 1) (page 4, item (page 4, item 4) O of Transaction × **PURCHASE** Type SALE × × **EXCHANGE** Check Box if Capital Gain Exceeded \$200 Quarterly, Monthly, or Bi-weekly, if (MO/DAY/YR) 07-05-12 01-04-12 11-19-12 09-12-12 applicable 10-12-12 Date \$1,001-\$15,000 > × × × × \$15,001-\$50,000 W \$50,001-\$100,000 n Amount of Transaction \$100,001-O \$250,000 \$250,001 m \$500,000 \$500,001-T \$1,000,000 \$1,000,001 \$5,000,000 Ω \$5,000,001 I \$25,000,000 \$25,000,001-\$50,000,000 Över ے \$50,000,000 Over \$1,000,000 大 (Spouse/DC Asset)

#### SCHEDULE V— LIABILITIES

Name Joseph P. Kennedy III Page 31 of 33

Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or dependent child. Mark the highest amount owed during the year. Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless it is rented out or you are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to a spouse, or the child, parent, or sibling of you or your spouse. Report revolving charge accounts (i.e., credit cards) only if the balance at the close of the preceding calendar year exceeded \$10,000. "This column is for liabilities held solely by your spouse or dependent child.

1				•	Ī	
SP	SP	SP		JT, CSP,		
Harvard University, Cambridge,MA	Aspire Resources, Des Moines, IA	Sallie Mae, Wilkes Barre, PA	Example:			
Jniversi	esource	e, Wilke	First Bank of Wilmington, DE	C		
y, Cam	s, Des l	эs Вапе	nk of Wilm	Creditor		
bridge,N	Moines,	, PA	nington, D	•		
A	A		m			
Sep 2006	Sep 2006	Nov 2006	May 1998	Date Liability Incurred Mo/Year		
900	006	900	998	¥ § §		
Student Loan	Student Loan	Student Loan	Mortga			
Loan	t Loan	t Loan	ge on 123	Type of Liability		
			Main St			
			Mortgage on 123 Main St., Dover, DE			
			m			
				\$10,001- \$15,000 >		
×		×		\$15,001- \$50,000 CD	I	
	×			\$50,001- \$100,000	I	
			×	\$100,001- \$250,000	l	
				\$250,001- \$500,000 m		
				\$500,001- \$1,000,000 TI		
·				\$250,001- \$500,000 m \$500,001- \$1,000,001- \$5,000,000 m		
				\$5,000,001- \$25,000,000 <b>T</b>		
ļ	<u> </u>		L	\$25,000,001- \$50,000,000		
	٠.		_	Over \$50,000,000 -		
		<u> </u>		Over \$1,600,600°		

#### SCHEDULE VI— GIFTS

Exclude: Gifts from relatives, gifts of personal hospitality of an individual, local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$140 or less need not be added towards the \$350 disclosure threshold. Report the source, a brief description, and the value of all gifts totalling more than \$350 received by you, your spouse, or a dependent child from any source during the year.

Note: The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule.

	Source	Description	Value
	Example: Mr. Joseph H. Smith, Anytown, Anystate	Silver Platter (determination on personal friendship received from Committee on Ethics)	\$375
	Not Applicable		
- 1			
- 7			
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ame	
Joseph	
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Kenned	
y III	

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## SCHEDULE VII — TRAVEL PAYMENTS AND REIMBURSEMENTS

or were paid by you and reimbursed by the sponsor. Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totalling more than \$350 received by you, your spouse, or a dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense, and the amount of time, if any, that was not at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor

Exclude: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (5 U.S.C. §7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to you.

	•	•				
Source	Date(s)	City of Departure—Destination— City of Return	Lodging? (Y/N)	Food? (Y/N)	Was a Family Member Included? (Y/N)	Number of days not at sponsor's expense
Examples: Chicago Chamber of Commerce	Mar. 2	DCChicagoDC		Z	Z	None
Roycroft Corporation	Aug. 6–11	DC—Los Angeles—Cleveland	Υ	Υ	Y	2 Days
Not Applicable						

#### SCHEDULE VIII—POSITIONS

Name Joseph P. Kennedy III

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organization, or any educational or other institution other than the United States. proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, any nonprofit organization, any labor Report all positions, compensated or uncompensated, held during the current calendar year as an officer, director, trustee of an organization, partner,

tions); and positions solely of an honorary nature. Exclude: Positions listed on Schedule I; positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organiza-

The state of the s	
Position	Name of Organization
Member Board of Directors	Robert F. Kennedy Memorial
Director	Robert F. Kennedy Children's Action Corps.
Member Board of Directors	Sooner Foundation

#### SCHEDULE IX—AGREEMENTS

employee welfare or benefit plan maintained by a former employer. 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

		_		
Date				
Parties To	NONE			
Terms of Agreement				