Name Jeff Fortenberry

### 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.

|           | Source                            | Type                | Amount  |
|-----------|-----------------------------------|---------------------|---------|
|           | Keene State                       |                     | \$6,000 |
| Evamologi |                                   | Legislative Pension | \$9,000 |
| Examples. |                                   |                     | \$1,000 |
|           | Ontario County Board of Education |                     | NA      |
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Page 3 of 9

# 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   | Activity | Date          | Amount  |
|--|----------|---------------|---------|
| Association of American Associations, Washington, DC | Speech   | Feb. 2, 2012  | \$2,000 |
| Examples: XYZ Magazine                               | Article  | Aug. 13, 2012 | \$500   |
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|                           |       | 99                    | 50   | 77     | J7                          | JŢ                               | DÇ,        | SP,                 | For an that is ness, it tion in Exclud homes income ing \$5, account from, a Savings If you income child (D optional For a d please   | e Sign   | plan   | Pro  | repo   |                            | $\exists$ |
|---------------------------|-------|-----------------------|------|--------|-----------------------------|----------------------------------|------------|---------------------|---|--|--|--|--|----------------------------|-----------|
| * Fst. rate based on 2011 | tared | CREF Colobal Equities | Z 11 | K Chec | Retail Book and Gitt Stores | 1st Bank of Paducah, KY Accounts |            | SP Mega Corp. Stock | For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.  Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); any deposits totaling \$5,000 or less in a personal checking or saving accounts; and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.  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 rental or other real property held for investment, provide a complete address or a description, e.g., "rental property" and a city and state | For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that exceeds the reporting thresholds. | 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 "unearned" income during the year. | Asset and/or Income Source | BLOCK A   |
| 1) cepucas                |       | × `                   | *    | X      | ×                           | ×                                | Indefinite |                     | None  \$1 - \$1,000  \$1,001 - \$15,000  \$15,001 - \$50,000  \$50,001 - \$100,000  \$100,001 - \$250,000  \$250,001 - \$500,000  \$500,001 - \$1,000,000  \$1,000,001 - \$5,000,000  \$1,000,001 - \$5,000,000  \$25,000,001 - \$50,000,000  \$25,000,001 - \$50,000,000  \$25,000,001 - \$50,000,000  \$25,000,001 - \$50,000,000   |  | <ul> <li>This column is for assets held solely by your<br/>spouse or dependent child.</li> </ul>   | If an asset was sold during the reporting year and is included only because it generated income, the value should be "None." | Indicate value of asset at close of reporting year. If you use a valuation method other than fair market value, please specify the method used.  | Value of Asset             | BLOCK B   |
|                           |       | ×                     | ×    | X      | Facence Facence             | ×                                | Royalties  | X                   | NONE DIVIDENDS RENT INTEREST CAPITAL GAINS EXCEPTED/BLIND TRUST TAX-DEFERRED Other Type of Income (Specify: e.g., Partnership Income or Farm Income)  | aporting period.   |  | IRAs), you may check the "Ti<br>Deferred" column. Dividends, int<br>est, and capital gains, even if re                       | check all columns that apply. For retirement accounts that do not allow you to choose specific investments or that generate tax-deferred income (such as 401(k) plans or   | Type of Ir                 | вгоск с   |
|                           |       | ×                     | X    | *      | ×*                          | ×                                |            | X                   | None       -         \$1 - \$200       =         \$201 - \$1,000       ≡         \$1,001 - \$2,500       <  | dependent child.   |  |  | T For assets for which you checked "Tax- t Deferred" in Block C, you may check the "None" column. For all other assets, indicate the category of income by checking the appropriate box below. Dividends, interest   |                            | BLOCK D   |
|                           |       |                       |      |        |                             |                                  |            | S (partial)         | portion of an asset is sold, please indicate as follows: (S) (partial) See below for example.  P, S, E  | If only a  |  | \$1,000 in<br>reporting  | asset had purchases (P), sales (S), or exchanges (F) exceeding   | Indicate if the            | вгоск е   |

Continuation Sheet (if needed)

SCHEDULE III—ASSETS AND "UNEARNED" INCOME Name Jeff Fortenberry

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|          |  |  |  |  |          |  |              |  |  |              |  |  |          | 6        | , ,<br>, ,        |   | +  | 3:   | 6  | 67             |   | t ar                                  |
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| Ì        |  | 1  |  | <u>'</u>   |          |  |              |  |  |              |  | }  | \<br>    |          | 63                | • | >  | 3  | 2  | , i            |   | BLOCK A                               |
| l        |  |  |  |  |          |  |              |  |  |              |  |  |          |          | Ocaves<br>S. T. S |   | Money Market Fund                                | Morgan   | Ledger (ustadia                                  | Financia,      |   | m ^                                   |
| l        |  |  |  |  |          |  |              |  |  |              |  |  |          |          | SN T              |   | 8  | 2  | 13   | 37             |   | Se                                    |
| l        |  |  |  |  |          |  |              |  |  |              |  |  |          |          | 6                 |   | 7.   | U.S.   | E  |                |   | <u>u</u>                              |
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|          | ļ  | -  |  | -  |          | -  |              | -  |  |              | _  | $\vdash$   |          |          |                   |   | ļ  | -  |  |                | \$1 - \$1,000   |                                       |
|          |  | <del> </del>                                     |  |  |          | <del> </del>                                     | ╁            |  |  | <b></b>      |  | <del>                                     </del> |          | 3        | V                 |   |  | <b>†</b>   |  |                | \$1,001 - \$15,000  |                                       |
|          |  | T  |  | <del> </del>                                     |          |  | <b> </b>     |  |  |              | <u> </u>   |  |          |          |                   |   |  |  |  |                | \$15,001 - \$50,000   | <                                     |
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|          |  |  |  |  |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                | \$100,001 - \$250,000   | BLOCK B Year-End ue of As:            |
|          |  |  |  |  |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                | \$250,001 – \$500,000 ົ                                       | <b>₹</b> ₩ 8                          |
|          |  |  |  |  |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                | \$500,001 - \$1,000,000 I                                     | e<br>Pu                               |
|          |  |  |  | L_   |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                | \$1,000,001 - \$5,000,000                                     | 욘                                     |
|          |  | <u> </u>   |  | L_   |          | <u> </u>   | L            | _  |  |              |  |  |          |          |                   |   |  | <u> </u>   |  |                | \$5,000,001 - \$25,000,000 <u>-</u>                           |                                       |
|          | <u> </u>   | ļ <u>.</u>                                       | <u> </u>   | <u>L</u> _                                       |          |  |              |  | ļ  | ļ            |  |  |          |          |                   |   | ļ  |  |  |                | \$25,000,001 - \$50,000,000 ~                                 |                                       |
| <u> </u> | <u>.</u>   | <u> </u>   | _  | <u> </u>   |          |  |              | ļ  | <u> </u>   | <u> </u>     | <u> </u>   | _  |          |          |                   |   | ļ  | <u> </u>   |  |                | Over \$50,000,000   | ĺ                                     |
| L        |  |  |  |  | ļ        |  |              |  |  |              |  |  | Ļ        |          |                   |   |  |  |  | L.             | Spouse/DC Asset over \$1,000,000° ≤                           | -                                     |
|          |  |  | <u> </u>   | L_   |          |  |              |  | L  |              |  | <u> </u>   |          |          | Ш                 |   | ļ  | <u> </u>   |  | ļ              | NONE  |                                       |
| L_       |  | <u> </u>   | <u> </u>   |  |          |  |              | _  | ļ  | ļ            | _  | _  |          |          |                   |   |  |  |  | <u> </u>       | DIVIDENDS   |                                       |
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| ⊩        |  | -  | <del> </del>                                     | <del> </del> -                                   | ļ        |  |              | <del> </del>                                     |  | -            |  | <u> </u>   |          |          |                   |   |  |  |  | -              | CAPITAL GAINS   | KC<br>On                              |
| ┡        | -  | ļ  | $\vdash$   | ├-   | -        | -  |              | $\vdash$   |  | <del> </del> |  | ╁─   | -        |          | X                 |   | <u> </u>   | ×  |  |                | EXCEPTED/BLIND TRUST  TAX-DEFERRED                            | ĕ                                     |
| $\vdash$ |  |  | ├  |  |          |  |              | ╁  |  |              |  | ┢  | ļ        | -        | <b>\</b>          |   | ļ  |  |  | ╁              | Other Type of Income  |                                       |
|          |  |  |  |  |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                | (Specify: e.g., Partnership                                   |                                       |
| H        |  | <del>                                     </del> | -  | -  |          |  |              |  |  |              | ļ  | <del> </del>                                     |          |          |                   |   | <br>   |  | <u> </u>   | -              | Income or Farm Income)  |                                       |
| ⊢        | -  | -  | -  | ├-   |          | <del> </del>                                     |              | ┢  |  | <b> </b>     | -  | ├  |          | <b> </b> | く                 |   | l  | ×  |  |                | None  |                                       |
| ┝        |  | -  | ┢  |  |          |  | _            | ├  |  | <del> </del> | -  | ├  |          |          | $\vdash$          |   | ļ  | -  |  |                | \$201 \$1,000 <b>=</b>  | A                                     |
|          | -  | $\vdash$   | <del> </del>                                     | ├-   | _        |  | <del> </del> | <del> </del>                                     | <del> </del>                                     |              | <b></b>  | <del>                                     </del> |          |          |                   |   | <u> </u>   |  | <del> </del>                                     |                | \$1,001 - \$2,500   | mo                                    |
| $\vdash$ | -  | -  | ├  | -  |          |  | ł            | ╁  |  | -            |  | -  |          |          |                   |   |  | ╁  | -  |                | \$2,501 – \$5,000   | B<br>Nun                              |
| $\vdash$ |  | <del>                                     </del> | <del> </del>                                     | ├-   |          |  | <del> </del> | ╁┈   | <b></b>  |              | -  | ├  | -        |          |                   |   | <b></b>  |  |  | <del> </del> - | \$5,001 - \$15,000 <b>\leq</b>                                | BLOCK D                               |
| ├        | <del>                                     </del> |  | <del>                                     </del> | -  |          | <del>                                     </del> | <u> </u>     | <del>                                     </del> | <del>                                     </del> | <del> </del> | <del>                                     </del> | ┞  |          |          |                   |   | <del>                                     </del> | <del>                                     </del> | <del>                                     </del> | $\vdash$       | \$15,001 - \$50,000 ≦   | * * * * * * * * * * * * * * * * * * * |
|          |  | 1  | <del>                                     </del> |  | -        | t  | T            | †  | <b></b>  | $t^-$        | t  | $t^-$  | <u> </u> | <u> </u> | П                 |   | t  | †  |  | T              | \$15,001 - \$50,000 <u>≦</u><br>\$50,001 - \$100,000 <u>≦</u> | BLOCK D  Amount of Income             |
| H        | <b>T</b>   |  | <u> </u>   | <del>                                     </del> |          | <b>†</b>   |              |  |  |              |  | <del>                                     </del> |          |          |                   |   |  |  |  |                | \$100,001 - \$1,000,000 💢                                     | æ                                     |
|          | ļ  |  | $\vdash$   | $\vdash$   |          |  |              |  |  |              | <del>                                     </del> | Π  |          |          |                   |   | 1  | İ  |  | † <del></del>  | \$1,000,001 - \$5,000,000                                     |                                       |
|          |  |  | $I^-$  |  |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                | Over \$5,000,000  |                                       |
|          |  |  |  |  |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                | Spouse/DC Income over \$1,000,000* ≚                          |                                       |
| Г        |  |  |  |  |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                |   | B<br>Tra                              |
|          |  |  |  |  |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                | ரைவு  | BLOCK E<br>Transaction                |
|          |  |  |  |  |          |  |              |  |  |              |  |  |          |          |                   |   |  |  |  |                | -   | ctio X                                |
| ᆫ        |  |  |  |  | <u> </u> | 1  | <u> </u>     |  | <u> </u>   | 1            | <u> </u>   | <u></u>  | 1        | <u> </u> |                   |   |  |  | 1  | 1              |   | 3                                     |

## **SCHEDULE IV— TRANSACTIONS**

Name Jeff Fortenberry

|   |   |   |   |  |   |   |      |   |  | Example: Mega Corpor | SP, DC, JT Asset | 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.  * This column is for assets solely held by your spouse or dependent child. | 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. | in 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 |
|---|---|---|---|--|---|---|------|---|--|----------------------|------------------|---|--|---|--|
|   |   |   |   |  |   |   |      |   |  |                      |                  | PURCH   | ASE  |   | of Tr  |
|   |   | , |   |  | 1 | 1 |      | 1 |  | ×                    |                  | SALE  |  |   | Type of Transaction  |
|   |   |   |   |  |   |   |      |   |  |                      |                  | EXCHA   | NGE  |   | tion   |
| 1 |   |   |   |  |   |   |      |   |  |                      |                  | Check E<br>Gain Ex  | Box if C   | apita<br>d \$20   | I<br>0   |
|   |   |   | - |  |   |   |      |   |  | 10-12-12             |                  | Bi-weekly, if applicable  | or<br>Quarterly,   | (MO/DAY/YR)   | Date   |
|   |   |   |   |  |   |   |      |   |  |                      |                  | \$1,001-<br>\$15,000  |  | >   |  |
|   |   |   |   |  |   | : |      |   |  | ×                    |                  | \$15,001-<br>\$50,000   |  | Φ   |  |
|   |   |   |   |  |   |   |      |   |  |                      |                  | \$50,001-<br>\$100,000  |  | <u>ဂ</u>  | <b>A</b>   |
|   |   |   |   |  |   |   |      |   |  |                      |                  | \$100,001-<br>\$250,000   |  | 0   | Amount   |
|   | - |   |   |  |   |   |      |   |  |                      |                  | \$250,001-<br>\$500,000   |  | m   | nt of  |
|   | - |   |   |  |   |   |      |   |  |                      |                  | \$500,001-<br>\$1,000,000   |  | <b>TI</b>   | Trai   |
|   | - |   |   |  |   |   |      |   |  |                      |                  | \$1,000,001-<br>\$5,000,000   |  | <u>ດ</u>  | Transaction  |
|   |   |   |   |  |   |   | <br> |   |  |                      |                  | \$5,000,001-<br>\$25,000,000  | )  | <b>I</b>  | tion   |
|   |   |   |   |  |   |   |      |   |  | Ц                    |                  | \$25,000,001<br>\$50,000,000<br>Over  |  |   |  |
|   |   |   |   |  |   |   |      |   |  |                      | -                | \$50,000,000<br>Over \$1,000,00   |  | <u>د</u>  |  |
|   |   |   |   |  |   |   |      |   |  |                      |                  | (Spouse/DC As   |  | <u> </u>  |  |

#### SCHEDULE V— LIABILITIES

Name Jeff Fortenberry

Page Z of

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 close of the preceding calendar year exceeded \$10,000. \*This column is for liabilities held solely by your spouse or dependent child. 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 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

| i  | <br> |   |                       |   |                                       | <u></u>                                     |           |                     | _ |
|--|------|---|-----------------------|---|---------------------------------------|---|-----------|---------------------|---|
| ,  |      |   | JT                    | JT  |                                       | 4,5,5,5                                     | 3         |                     |   |
| * Annual orgoing line ofcredit for Gloria Deo, Inchusine |      |   | Union Bank Lincoln NE | Mutual of Oraha Bank Linedy NE 2010 Mortgage on Personal reside | Example: First Bank of Wilmington, DE | Creditor                                    |           |                     |   |
| t for  |      |   | Sept<br>2012          | Pec<br>2010   | May 1998                              | Incurred<br>Mo/Year                         | Liability | Date                |   |
| Gloria Deo, Inchusiness                                  |      |   | tor bloria Deo Inc. * | Mortgage on Personal residen                                    | Mortgage on 123 Main St., Dover, DE   | Type of Liability                           |           |                     |   |
|  |      |   |                       |   |                                       | \$10,001-<br>\$15,000                       | Α         |                     |   |
| 7<br>7   |      |   | $\times$              |   |                                       | \$15,001-<br>\$50,000                       | В         |                     |   |
| 205  |      |   |                       |   |                                       | \$50,001-<br>\$100,000                      | ဂ         |                     |   |
| transoctions   |      |   |                       |   | ×                                     | \$100,001-<br>\$250,000                     | D         | ₽                   |   |
| 'n   |      |   |                       | ×   |                                       | \$250,001-<br>\$500,000                     | m         | noun                |   |
|  |      |   |                       |   |                                       | \$500,001-<br>\$1,000,000                   | П         | t of Li             |   |
|  |      |   |                       |   |                                       | \$1,000,001-<br>\$5,000,000                 | G         | Amount of Liability |   |
|  |      | _ |                       |   |                                       | \$5,000,001-<br>\$25,000,000                |           |                     |   |
|  |      |   |                       |   |                                       | \$25,000,001<br>\$50,000,000                |           |                     |   |
|  |      |   |                       |   |                                       | Over<br>\$50,000,000<br>Spouse/DC Liability | _         |                     |   |
|  | <br> |   |                       |   |                                       | Over \$1,000,000*                           | ~         |                     | L |
|  | <br> |   |                       |   |                                       |   |           |                     |   |

#### 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

|   |  |  |   |             | _ |
|---|--|--|---|-------------|---|
|   |  |  | Example:  |             |   |
|   |  |  | Example: Mr. Joseph H. Smith, Anytown, Anystate   | Source      |   |
|   |  |  | Silver Platter (determination on personal friendship received from Committee on Ethics) | Description |   |
| , |  |  | \$375   | Value       |   |

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# SCHEDULE VII — TRAVEL PAYMENTS AND REIMBURSEMENTS

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 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 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

spouse or dependent child that is totally independent of his or her relationship to you. 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 or were paid by you and reimbursed by the sponsor.

|  | Examples:                   | Lyan ipi co.             | Carn                               |   |      |  |  |  |  |   |  |
|--|-----------------------------|--------------------------|------------------------------------|---|------|--|--|--|--|---|--|
| Source   | Chicago Chamber of Commerce | Roycroft Corporation     | Carnegie Corp of New York Nov 30 - |   |      |  |  |  |  |   |  |
| Date(s)  | Mar. 2                      | Aug. 6–11                | Nov 30 —<br>Oecl, 2012             |   |      |  |  |  |  |   |  |
| City of Departure—Destination—<br>City of Return | DC—Chicago—DC               | DC—Los Angeles—Cleveland | OC - Queenstown, MO-               |   |      |  |  |  |  |   |  |
| Lodging?<br>(Y/N)                                |                             | Υ                        | <b>Y</b>                           |   |      |  |  |  |  | : |  |
| Food?<br>(Y/N)                                   | Z                           | ~                        | У                                  |   | <br> |  |  |  |  |   |  |
| Was a Family<br>Member Included?<br>(Y/N)        | Z                           | Υ                        | Y                                  | , |      |  |  |  |  |   |  |
| Number of days <u>not</u> at sponsor's expense   | None                        | 2 Days                   | None                               |   |      |  |  |  |  | į |  |

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Name Jeff Fortenberry

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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-

| Position | Name of Organization |
|----------|----------------------|
|          |                      |
|          |                      |
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#### SCHEDULE IX—AGREEMENTS

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. 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

| Date | Parties To | Terms of Agreement |
|------|------------|--------------------|
|      |            |                    |
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