



Filing ID #10008646

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Katherine M. Clark
Status: Member
State/District: MA05

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2013
Filing Date: 09/17/2015

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise SEP IRA ⇒ Columbia Dividend Income	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ Columbia Marisco Flex Cap	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ Fidelity Advisor Floating Rate	SP	\$1,001 - \$15,000	Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ Fidelity Advisor Mid Cap	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ Fidelity Advisor New Insights	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$1,001 - \$2,500	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ Janus Triton	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise SEP IRA ⇒ John Hancock Income	SP	\$1,001 - \$15,000	Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ MFS Bond Fund	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ MFS Mass Investors Trust	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ Oppenheimer Developing Markets	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ Oppenheimer International Bond Fund	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Ameriprise SEP IRA ⇒ Western Asset Core Plus Bond Fund	SP	\$1,001 - \$15,000	Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ American Beacon Flex Bond Fund	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ Columbia Dividend Income	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ Fidelity Advisor Floating Rate	SP	\$1,001 - \$15,000	Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ Fidelity Advisor Mid Cap	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ Fidelity Advisor New Insights	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$1,001 - \$2,500	<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ John Hancock Income	SP	\$1,001 - \$15,000	Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ MFS New Discovery	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Traditional IRA ⇒ MFS Utilities	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ Oppenheimer Developing Markets	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ Western Asset Core Plus Bond Fund	SP	\$1,001 - \$15,000	Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Bank of America Account		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
COPERA		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
COPERA 401(K) Plan ⇒ PERAdvantage 2030 Fund		\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	<input type="checkbox"/>
COPERA 401(K) Plan ⇒ PERAdvantage US Large Cap Stock		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
D1 Irrevocable Trust ⇒ John Hancock 529 College Portfolio C2 LOCATION: MA	DC	\$15,001 - \$50,000	Tax-Deferred	\$1,001 - \$2,500	<input type="checkbox"/>
D1 Irrevocable Trust ⇒ John Hancock 529 Fixed Income Portfolio 2 LOCATION: MA	DC	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
D1 Irrevocable Trust ⇒ John Hancock 529 Short Term Bond Portfolio 2 LOCATION: MA	DC	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
D1 Irrevocable Trust ⇒ Sequoia Fund	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	<input type="checkbox"/>
D2 Irrevocable Trust ⇒ John Hancock 529 College Portfolio C2 LOCATION: MA	DC	\$15,001 - \$50,000	Tax-Deferred	\$1,001 - \$2,500	<input type="checkbox"/>
D2 Irrevocable Trust ⇒ John Hancock 529 Fixed Income Portfolio 2 LOCATION: MA	DC	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
D2 Irrevocable Trust ⇒ John Hancock 529 Short Term Bond Portfolio 2 LOCATION: MA	DC	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
D2 Irrevocable Trust ⇒ Sequoia Fund	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	<input type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 College Portfolio C2 LOCATION: MA	DC	\$15,001 - \$50,000	Tax-Deferred	\$1,001 - \$2,500	<input type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 Fixed Income Portfolio 2 LOCATION: MA	DC	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 Short Term Bond Portfolio 2 LOCATION: MA	DC	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
D3 Irrevocable Trust ⇒ Sequoia Fund	DC	\$1,001 - \$15,000	Capital Gains, Dividends	None	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ 3M Company (MMM)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ AbbVie Inc. (ABBV)		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Accenture plc. Class A Ordinary Shares (ACN)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Adv Inner Circle Fund II Grt Valu Fd Cl		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Advanced Micro Devices Inc SR NT DESCRIPTION: 7.75%, 8/1/20		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ ADVISORSHARES TR PERITUS HIGH YIELD ETF		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Alerian MLP ETF (AMLP)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Judith S. Clark Irrevocable Trust ⇒ ALLEGHENY TECHNOLOGIES INC FIXED RATE		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 5.875%, 8/1/23					
Judith S. Clark Irrevocable Trust ⇒ ALLY FINL INC GTD SRFXD RT		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: 4.75%, 9/10/18					
Judith S. Clark Irrevocable Trust ⇒ ALLY FINL INC MEDIUMTERM NTS FXD RT SER A		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 2.35%, 4/15/15					
Judith S. Clark Irrevocable Trust ⇒ Amerigas Fincorp/ Amerigas Fin LLC GTD Fixed		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: 7.0%, 6/20/22					
Judith S. Clark Irrevocable Trust ⇒ Ameriprise Financial, Inc. (AMP)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Amsouth Bancorporation Sub Deb		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 6.75%, 11/1/25					
Judith S. Clark Irrevocable Trust ⇒ Apple Inc. (AAPL)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ AQR Funds Diversified Arbi Cl		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ ASHLAND INC NEW GTD FIXED RT SR		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 3.875%, 4/15/18					
Judith S. Clark Irrevocable Trust ⇒ ASTON/Montag & Caldwell Growth		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Avondale AZ Projs of 1998 2007 Build Amer		\$15,001 - \$50,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 7.8%, 7/1/29					
Judith S. Clark Irrevocable Trust ⇒ B&G Foods, Inc. B&G Foods, Inc. (BGS)		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Boeing Company (BA)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Judith S. Clark Irrevocable Trust ⇒ BP p.l.c. (BP)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Camden County NJ Impt Auth Lease Rev Taxable-C		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 6.72%, 7/1/23					
Judith S. Clark Irrevocable Trust ⇒ Cash		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Cash holdings					
Judith S. Clark Irrevocable Trust ⇒ Chemtura Corp GTD SR		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 5.75%, 7/15/21					
Judith S. Clark Irrevocable Trust ⇒ CHESAPEAKE ENERGY CORP GTD SR FIXED NT		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 6.125%, 2/5/21					
Judith S. Clark Irrevocable Trust ⇒ CHESAPEAKE ENERGY CORP SR NT		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: 5.375%, 6/15/21					
Judith S. Clark Irrevocable Trust ⇒ Chevron Corporation (CVX)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Clean Harbors Inc GTD FXD NT		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 5.125%, 12/1/18					
Judith S. Clark Irrevocable Trust ⇒ Cliffs Nat Res Inc Fixed RT SR NT		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: 4.8%, 10/1/20					
Judith S. Clark Irrevocable Trust ⇒ CME Group Inc. - Class A (CME)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Coca-Cola Company (KO)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ ConocoPhillips (COP)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Corporate Capital Trust		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Judith S. Clark Irrevocable Trust ⇒ Dodge Cox Stock Fund		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Doubleline Funds Trust Total Return I		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Eaton Corporation, PLC Ordinary Shares (ETN)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Eaton Vance Muni National Munis Cl I		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Emerson Electric Company (EMR)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Flextronics Intl Ltd SR NT		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 4.625%, 12/15/20					
Judith S. Clark Irrevocable Trust ⇒ FS Energy and Power Fund		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Gannett Co., Inc. (GCI)		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ General Electric Company (GE)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Hartford MF Cap Appreciation Fd Cl I		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Home Depot, Inc. (HD)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Hotchkis Wiley High Yield Fd Cl A		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ International Business Machines Corporation (IBM)		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Johnson & Johnson (JNJ)		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Judith S. Clark Irrevocable Trust ⇒ Johnson Controls, Inc. (JCI)		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ JP Morgan Chase & Co. (JPM)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ JP Morgan Tr I Strat Incm Opptys Select		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ KLA-Tencor Corporation (KLAC)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Las Vegas Sands Corp. (LVS)		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Lockheed Martin Corporation (LMT)		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Lord Abbett Invt Tr Short Dur Incm Cl F		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ LyondellBasell Industries NV Ordinary Shares Class A (LYB)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Mattel, Inc. (MAT)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Merck & Company, Inc. Common Stock (MRK)		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ MFS Ser Tr V Resh Fd Cl I		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ MICROSOFT CORP FIXEDRT NT DESCRIPTION: 2.375%, 05/01/23		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ MICROSOFT CORP FIXEDRT NT DESCRIPTION: 3.0%, 10/1/20		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Microsoft Corporation (MSFT)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Judith S. Clark Irrevocable Trust ⇒ Nebraska Coop Republican Platte Enhancement		\$15,001 - \$50,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 4.6%, 12/15/22					
Judith S. Clark Irrevocable Trust ⇒ New Orleans LA RFDG-Taxable-Ltd Tax		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 3.142%, 9/1/20					
Judith S. Clark Irrevocable Trust ⇒ Newmont Mng Corp SR NT		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 3.5%, 3/15/22					
Judith S. Clark Irrevocable Trust ⇒ NextEra Energy, Inc. (NEE)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Norfolk Southern Corporation (NSC)		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Oakland Cnty MI CTFS Partn Retiree Med Bene		\$15,001 - \$50,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 6.25%, 4/1/22					
Judith S. Clark Irrevocable Trust ⇒ Pfizer, Inc. (PFE)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Philip Morris International Inc (PM)		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ PNC Financial Services Group, Inc. (PNC)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ POST HLDGS INC GTD SR NT		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 7.375%, 2/15/22					
Judith S. Clark Irrevocable Trust ⇒ PowerShares QQQ Trust, Series 1 (QQQ)		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ PPG Industries, Inc. (PPG)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ PPL Energy Supply LLC SR NT		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 4.6%, 12/15/21					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Judith S. Clark Irrevocable Trust ⇒ Puerto Rico Commonwealth Govt Dev BK RFDG SR NTS		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 5.2%, 8/1/26					
Judith S. Clark Irrevocable Trust ⇒ QUALCOMM Incorporated (QCOM)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Ryland Group Inc SR NT		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 5.375% 10/1/22					
Judith S. Clark Irrevocable Trust ⇒ Stone Energy Corp GTD FXD RT SR		\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: 7.5%, 11/15/22					
Judith S. Clark Irrevocable Trust ⇒ Tenet Healthcare Corp SR SECD NT		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: 4.75%, 6/1/20					
Judith S. Clark Irrevocable Trust ⇒ Tesoro Corp SR NT		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 5.375%, 10/1/22					
Judith S. Clark Irrevocable Trust ⇒ The Travelers Companies, Inc. (TRV)		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Time Warner Cable Inc (TWC)		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ T-Mobile USA Inc GTD SR FXD RT		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 6.633%, 4/28/21					
Judith S. Clark Irrevocable Trust ⇒ TOLL BROS FIN CORP GTD FXD RT		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 4.0%, 12/31/18					
Judith S. Clark Irrevocable Trust ⇒ Tronox Fin LLC GTD SR NT		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 6.375%, 8/15/20					
Judith S. Clark Irrevocable Trust ⇒ United Parcel Service, Inc. (UPS)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Judith S. Clark Irrevocable Trust ⇒ Verizon Communications Inc. (VZ)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Walt Disney Company (DIS)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ WellPoint, Inc. (WLP)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Wells Fargo & Company (WFC)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Wells Fargo Advtg Divers Cap Bldr Fd		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Western Asset Core Plus Bd Port Cl I		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Williams Companies, Inc. (WMB)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Wisdom Tree Midcap		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Wisdom Tree Small Cap		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Woolworth Corp DEB N/C 1998-Ventator Corp & N DESCRIPTION: 8.5%, 1/15/22		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Wynn Las Vegas LLC Cap Corp DESCRIPTION: 5.375%, 3/15/22		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Zions Bancorporation Medium Term SR NTS SR NT DESCRIPTION: 5.65%, 11/15/23		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Massachusetts state pension		Undetermined	None		<input type="checkbox"/>
Sequoia Fund		\$250,001 - \$500,000	Capital Gains, Dividends	None	<input type="checkbox"/>

* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS


Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Judith S. Clark Irrevocable Trust ⇒ 3M Company (MMM)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ AbbVie Inc. (ABBV)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Accenture plc. Class A Ordinary Shares (ACN)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Adv Inner Circle Fund II Grt Valu Fd Cl		12/1/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Advanced Micro Devices Inc SR NT DESCRIPTION: 7.75%, 8/1/20		06/18/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ ADVISORSHARES TR PERITUS HIGH YIELD ETF		10/15/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Alerian MLP ETF (AMLPE)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ ALLEGHENY TECHNOLOGIES INC FIXED RATE DESCRIPTION: 5.875%, 8/1/23		07/23/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ ALLY FINL INC GTD SRFXD RT DESCRIPTION: 4.75%, 9/10/18		09/12/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ ALLY FINL INC GTD SRFXD RT DESCRIPTION: 4.75%, 9/10/18		09/18/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ ALLY FINL INC MEDIUMTERM NTS FXD RT SER A DESCRIPTION: 2.35%, 4/15/15		06/26/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Amerigas Fincorp/ Amerigas Fin LLC GTD Fixed		06/11/2013	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: 7%, 6/20/22					
Judith S. Clark Irrevocable Trust ⇒ Ameriprise Financial, Inc. (AMP)		09/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Amsouth Bancorporation Sub Deb		06/20/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 6.75%, 11/1/25					
Judith S. Clark Irrevocable Trust ⇒ Amsouth Bancorporation Sub Deb		08/5/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 6.75%, 11/1/25					
Judith S. Clark Irrevocable Trust ⇒ Apple Inc. (AAPL)		06/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ ASHLAND INC NEW GTD FIXED RT SR		10/8/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 3.875%, 4/15/18					
Judith S. Clark Irrevocable Trust ⇒ ASTON/Montag & Caldwell Growth		12/1/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Avondale AZ Projs of 1998 2007 Build Amer		07/2/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 7.8%, 07/01/29					
Judith S. Clark Irrevocable Trust ⇒ Avondale AZ Projs of 1998 2007 Build Amer		07/8/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 7.8%, 07/01/29					
Judith S. Clark Irrevocable Trust ⇒ B&G Foods, Inc. B&G Foods, Inc. (BGS)		06/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Boeing Company (BA)		06/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ BP p.l.c. (BP)		11/6/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Camden County NJ Impt Auth Lease Rev Taxable-C		06/26/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 6.72%, 07/01/23					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Judith S. Clark Irrevocable Trust ⇒ Chemtura Corp GTD SR DESCRIPTION: 5.75%, 7/15/21		07/25/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ CHESAPEAKE ENERGY CORP GTD SR FIXED NT DESCRIPTION: 6.125%, 2/5/21		06/6/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ CHESAPEAKE ENERGY CORP SR NT DESCRIPTION: 5.375%, 6/15/21		09/23/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Chevron Corporation (CVX)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Clean Harbors Inc GTD FXD NT DESCRIPTION: 5.125%, 12/1/18		10/29/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Cliffs Nat Res Inc Fixed RT SR NT DESCRIPTION: 4.8%, 10/1/20		06/13/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ CME Group Inc. - Class A (CME)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Coca-Cola Company (KO)		06/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ ConocoPhillips (COP)		09/5/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Corporate Capital Trust		06/3/2013	P	\$50,001 - \$100,000	
Judith S. Clark Irrevocable Trust ⇒ Dodge Cox Stock Fund		12/1/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Eaton Vance Corporation (EV)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Emerson Electric Company (EMR)		10/11/2013	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Judith S. Clark Irrevocable Trust ⇒ Emerson Electric Company (EMR)		10/23/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Flextronics Intl Ltd SR NT		09/12/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 4.625%, 12/15/20					
Judith S. Clark Irrevocable Trust ⇒ Forward GLB		12/1/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ FS Energy and Power Fund		06/3/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Gannett Co., Inc. (GCI)		10/3/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ General Electric Company (GE)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Hartford MF Cap Appreciation Fd Cl I		12/1/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Home Depot, Inc. (HD)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ International Business Machines Corporation (IBM)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Johnson & Johnson (JNJ)		11/6/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Johnson Controls, Inc. (JCI)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ JP Morgan Chase & Co. (JPM)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ JP Morgan Chase & Co. (JPM)		12/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ JP Morgan Tr I Strat Incm Opptys Select		12/1/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒		10/11/2013	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
KLA-Tencor Corporation (KLAC)					
Judith S. Clark Irrevocable Trust ⇒ KLA-Tencor Corporation (KLAC)		10/23/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Las Vegas Sands Corp. (LVS)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Lockheed Martin Corporation (LMT)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Lord Abbett Inv't Tr Short Dur Incm Cl F		12/1/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ LyondellBasell Industries NV Ordinary Shares Class A (LYB)		10/11/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ LyondellBasell Industries NV Ordinary Shares Class A (LYB)		10/23/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Mattel, Inc. (MAT)		06/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Mattel, Inc. (MAT)		11/6/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Merck & Company, Inc. Common Stock (MRK)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ MFS Ser Tr V Resh Fd Cl I		12/1/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ MICROSOFT CORP FIXEDRT NT		12/16/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 2.375%, 5/1/23 COMMENTS: Corrected to reflect accurate interest rate, maturity date.					
Judith S. Clark Irrevocable Trust ⇒ Microsoft Corporation (MSFT)		06/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Microsoft Corporation (MSFT)		11/6/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒		08/8/2013	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Nebraska Coop Republican Platte Enhancement					
DESCRIPTION: 4.6%, 12/15/22					
Judith S. Clark Irrevocable Trust ⇒ New Orleans LA RFDG-Taxable-Ltd Tax		07/15/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 3.142%, 09/01/20					
Judith S. Clark Irrevocable Trust ⇒ Newmont Mng Corp SR NT		06/26/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 3.5%, 3/15/22					
Judith S. Clark Irrevocable Trust ⇒ Newmont Mng Corp SR NT		08/5/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 3.5%, 3/15/22					
Judith S. Clark Irrevocable Trust ⇒ NextEra Energy, Inc. (NEE)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Norfolk Southern Corporation (NSC)		11/6/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Oakland Cnty MI CTFIS Partn Retiree Med Bene		07/15/2013	P	\$15,001 - \$50,000	
DESCRIPTION: 6.25%, 04/01/22					
Judith S. Clark Irrevocable Trust ⇒ Pfizer, Inc. (PFE)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Philip Morris International Inc (PM)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Pimco TTL		12/1/2013	S	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ PNC Financial Services Group, Inc. (PNC)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ POST HLDGS INC GTD SR NT		09/24/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 7.375%, 2/15/22					
Judith S. Clark Irrevocable Trust ⇒ PowerShares QQQ Trust, Series 1 (QQQ)		06/4/2013	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Judith S. Clark Irrevocable Trust ⇒ PPG Industries, Inc. (PPG)		06/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ PPL Energy Supply LLC SR NT		12/3/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 4.6%, 12/15/21					
Judith S. Clark Irrevocable Trust ⇒ Puerto Rico Commonwealth Govt Dev BK RFDG SR NTS		10/8/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 5.2%, 08/01/26					
Judith S. Clark Irrevocable Trust ⇒ QUALCOMM Incorporated (QCOM)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Ryland Group Inc SR NT		08/1/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 5.375%, 10/1/22					
Judith S. Clark Irrevocable Trust ⇒ Ryland Group Inc SR NT		08/12/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 5.375%, 10/1/22					
Judith S. Clark Irrevocable Trust ⇒ Stone Energy Corp GTD FXD RT SR		11/26/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 7.5%, 11/15/22					
Judith S. Clark Irrevocable Trust ⇒ Tenet Healthcare Corp SR SECD NT		09/5/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 4.75%, 6/1/20					
Judith S. Clark Irrevocable Trust ⇒ Tesoro Corp SR NT		07/24/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 5.375%, 10/1/22					
Judith S. Clark Irrevocable Trust ⇒ The Travelers Companies, Inc. (TRV)		11/26/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Time Warner Cable Inc (TWC)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ T-Mobile USA Inc GTD SR FXD RT		10/17/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 6.633%, 4/28/21					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Judith S. Clark Irrevocable Trust ⇒ TOLL BROS FIN CORP GTD FXD RT DESCRIPTION: 4.0%, 12/31/2018		11/19/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Tronox Fin LLC GTD SR NT DESCRIPTION: 6.375%, 8/15/20		11/7/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ United Parcel Service, Inc. (UPS)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Verizon Communications Inc. (VZ)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Virtus Emerging Market		12/1/2013	S	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Walt Disney Company (DIS)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ WellPoint, Inc. (WLP)		09/5/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Wells Fargo & Company (WFC)		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Wells Fargo Advtg Divers Cap Bldr Fd		12/1/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Williams Companies, Inc. (WMB)		06/4/2013	P	\$1,001 - \$15,000	
Judith S. Clark Irrevocable Trust ⇒ Wisdom Tree Midcap		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Wisdom Tree Small Cap		06/4/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Woolworth Corp DEB N/C 1998-Ventator Corp & N DESCRIPTION: 8.5%, 1/15/22		07/16/2013	P	\$15,001 - \$50,000	
Judith S. Clark Irrevocable Trust ⇒ Wynn Las Vegas LLC Cap Corp		08/15/2013	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: 5.375%, 03/15/22					
Judith S. Clark Irrevocable Trust ⇒ Zions Bancorporation Medium Term SR NTS SR NT		07/11/2013	P	\$1,001 - \$15,000	
DESCRIPTION: 5.65%, 11/15/23					

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Commonwealth of Massachusetts	salary	\$72,309.57
Lawyers Concerned for Lawyers	spouse salary	N/A
Concord Law School	spouse salary	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Corporator	The Savings Bank (Wakefield, MA)
COMMENTS: since resigned	
Board Member	UMass Boston Center for Women in Politics and Public Policy
Advisory Council	Massachusetts Department of Early Education and Care

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
July 1997	Katherine M. Clark and the Commonwealth of Massachusetts	future pension
September 1991	Katherine M. Clark and the state of Colorado (COPERA)	future pension

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Ameriprise SEP IRA (Owner: SP)
- Ameriprise Traditional IRA (Owner: SP)
- COPERA 401(K) Plan
- D1 Irrevocable Trust (Owner: DC)
- D2 Irrevocable Trust (Owner: DC)
- D3 Irrevocable Trust (Owner: DC)
- Judith S. Clark Irrevocable Trust

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

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: Hon. Katherine M. Clark , 09/17/2015