



Filing ID #10002474

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Mark S. Lofgren
Status: Congressional Candidate
State/District: IA02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2014
Filing Date: 05/16/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds Amcap Fund A	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
American Funds The New Economy A	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Dreyfus Smallcap Stock Index Fund	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
EMC Corporation (EMC)		\$1,001 - \$15,000	Tax-Deferred	None	None
First National Bank Checking Account	JT	\$15,001 - \$50,000	None		
Investco Small Cap Growth Fund	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
MCCU Checking Account - DBA Lofgren Investments		\$1,001 - \$15,000	None		
Personal Loan to Lofgren for Congress		\$15,001 - \$50,000	None		
Security Benefit Life Fixed Account	SP	\$50,001 - \$100,000	Tax-Deferred	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard 500 Index	SP	\$15,001 - \$50,000	Tax-Deferred	None	None

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
State of Iowa	salary	\$26,000	\$24,000
Muscatine Community School District	salary	\$43,905.26	\$65,234
Lofgren Investments	business income	N/A	\$89,364.17

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
State Representative	Iowa House of Representatives
Owner/Operator	Lofgren Investments
Registered Representative	Berthel Fisher & Company

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Source (Name and Address)	Brief Description of Duties
Rick Buller Financial Services, L.L.C. (Burlington, IA, US)	sale of Lofgren Investments (sole proprietorship) and assets

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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

☒ Yes ☐ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or

dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

COMMENTS

CERTIFICATION AND SIGNATURE

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

Digitally Signed: Mark S. Lofgren , 05/16/2014