

UNITED STATES HOUSE OF REPRESENTATIVES
CALENDAR YEAR 2009 FINANCIAL DISCLOSURE STATEMENT

Form A
 For use by Members, officers, and employees

HAND DELIVERED
 1 of 14

LEGISLATIVE RESOURCE CENTER

2010 MAY 13 PM 4:05

OFFICE OF THE CLERK
 U.S. HOUSE OF REPRESENTATIVES
 (Office Use Only)

Name:

Frederick

Daytime Telephone:

202-285-3761

| | | | | | | |
|--------------|---|------------------------|--------------------|---|-------------------|-------------------|
| Filer Status | <input checked="" type="checkbox"/> Member of the U.S. House of Representatives | State: <i>Michigan</i> | Office or Employee | <input type="checkbox"/> Officer or <input type="checkbox"/> Employee | Employing Office: | Termination Date: |
| Report Type | <input checked="" type="checkbox"/> Annual (May 17, 2010) | | Amendment | <input type="checkbox"/> | Termination | |

A \$200 penalty shall be assessed against anyone who files more than 30 days late.

PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

| | | | |
|---|---|---|---|
| I. Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period? If yes, complete and attach Schedule I. | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$335 and not otherwise exempt)? If yes, complete and attach Schedule VI. | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| II. 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? If yes, complete and attach Schedule II. | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$335 from one source)? If yes, complete and attach Schedule VII. | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| 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 <input checked="" type="checkbox"/> No <input type="checkbox"/> | VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year? If yes, complete and attach Schedule VIII. | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| 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. | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> | IX. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule IX. | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period? If yes, complete and attach Schedule V. | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | Each question in this part must be answered and the appropriate schedule attached for each "Yes" response. | |

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

| | |
|---|---|
| TRUSTS – Details regarding "Qualified Blind Trusts" approved by the Committee on Standards of Official Conduct 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 <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| 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? Do not answer "yes" unless you have first consulted with the Committee on Standards of Official Conduct. | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |

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For additional assets and unearned income, use next page.

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name

Upton

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| BLOCK A | | BLOCK B | | | | | | | | | | | | | BLOCK C | | | | | | | BLOCK D | | | | | | | | | | | BLOCK E | |
|----------------------------|-------------------------|-------------------------|---------------|--------------------|---------------------|----------------------|-----------------------|-----------------------|-------------------------|---------------------------|----------------------------|-----------------------------|-------------------|------|----------------|------|----------|---------------|----------------------|--------------------------------|------|------------------|-----------------|-------------------|-------------------|--------------------|---------------------|----------------------|-------------------------|---------------------------|------------------|--|-------------|---|
| Asset and/or Income Source | | Year-End Value of Asset | | | | | | | | | | | | | Type of Income | | | | | | | Amount of Income | | | | | | | | | | | Transaction | |
| | | A | B | C | D | E | F | G | H | I | J | K | L | NONE | DIVIDENDS | RENT | INTEREST | CAPITAL GAINS | EXCEPTED/BLIND TRUST | Other Type of Income (Specify) | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | | | |
| | | 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 | \$5,000,001 - \$25,000,000 | \$25,000,001 - \$50,000,000 | Over \$50,000,000 | | | | | | | | None | \$1 - \$200 | \$201 - \$1,000 | \$1,001 - \$2,500 | \$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 | | | |
| ST | Hillard Lyons Bank | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Chemical Financial Corp | | | | | | X | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| ST | Chesapeake Energy | | | | | X | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| ST | Regis | | | | | | X | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| ST | Pfizer | | | | | X | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| | Yum Brands | | | | | X | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| | Cumbrland, IN RA Bond | | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | P |
| ST | Hartford Mut. Fds | | | | | | X | | | | | | | | X | | | | | | | | | | | | | | | | | | | P |
| | MFS SER TR V | | | | X | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| | Seligman Tax Ex Fund | | | | X | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | Philip Morris | | | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | Ralcorp Holdings | | | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | Raytheon Co. NEW | | | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | Verizon | | | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | Vanguard RI Index Fd | | | | X | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | AT&T | | | | X | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | Allria Group | | | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | BP | | | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | Bristol Myers Squibb | | | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | Comcast Class A | | | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| S | Direct TV CL A | | | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |

Continuation Sheet (if needed)

Up to

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This page may be copied if more space is required.

SCHEDULE III — ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name

W. J. Brown

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| BLOCK A | | BLOCK B | | | | | | | | | | | | | BLOCK C | | | | | | BLOCK D | | | | | | | | | | | BLOCK E | | | |
|----------------------------|--|-------------------------|---|---|---|---|---|---|---|---|---|---|---|------|----------------|------|----------|---------------|----------------------|--------------------------------|------------------|----|-----|----|---|----|-----|------|----|---|----|-------------|--|--|--|
| Asset and/or Income Source | | Year-End Value of Asset | | | | | | | | | | | | | Type of Income | | | | | | Amount of Income | | | | | | | | | | | Transaction | | | |
| SP, DC, JT | | A | B | C | D | E | F | G | H | I | J | K | L | NONE | DIVIDENDS | RENT | INTEREST | CAPITAL GAINS | EXCEPTED/BLIND TRUST | Other Type of Income (Specify) | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | P, S, W | | | |
| JT | Family Trusts managed with control by me. Trusts managed by 5th grad Bank, Meridian State, JP. Morgan & Northern Trust | None | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | Trusts Total value: composed of: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | Cash | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | AT&T | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DC | Chesapeake Energy | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | Disney | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | General Electric | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | IBM | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | Pepsi | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DC | Styler | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | Wheelpool | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | 5th grad Prime & Mkt | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| JT | 5th grad Prime | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Accountech | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Abbott Labs | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Aetna | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Altria | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | American Express | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Apache | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Apple | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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Date 6/14

| BLOCK A | | BLOCK B | | | | | | | | | | | | | BLOCK C | | | | | | | BLOCK D | | | | | | | | | | | BLOCK E |
|----------------------------|--|-------------------------|---------------|--------------------|---------------------|----------------------|-----------------------|-----------------------|-------------------------|---------------------------|----------------------------|-----------------------------|-------------------|------|----------------|------|----------|---------------|----------------------|--------------------------------|------|------------------|-----------------|-------------------|-------------------|--------------------|---------------------|----------------------|-------------------------|---------------------------|------------------|--|-------------|
| Asset and/or Income Source | | Year-End Value of Asset | | | | | | | | | | | | | Type of Income | | | | | | | Amount of Income | | | | | | | | | | | Transaction |
| | | A | B | C | D | E | F | G | H | I | J | K | L | | | | | | | | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | | |
| | | 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 | \$5,000,001 - \$25,000,000 | \$25,000,001 - \$50,000,000 | Over \$50,000,000 | NONE | DIVIDENDS | RENT | INTEREST | CAPITAL GAINS | EXCEPTED/BLIND TRUST | Other Type of Income (Specify) | None | \$1 - \$200 | \$201 - \$1,000 | \$1,001 - \$2,500 | \$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 | | |
| Trusts - | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Applied Materials | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bank of America | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bank of NY Mellon | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Barter Int. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| BBAT | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| BP PLC Sponsored ADR | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bristol Myers Squibb | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CME Group | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Celgene Corp | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Chevron | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Cisco | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Coca Cola | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Colgate Polymerie | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Genoco Phillips | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Corning | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Covidien | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CS BM SPX Ben 3/4/10 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Cus/Leamark | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Danach | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Deere | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Deutsche BK ARO SPX 8/1/14 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name Upston

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| BLOCK A | | BLOCK B | | | | | | | | | | | | | BLOCK C | | | | | | BLOCK D | | | | | | | | | | | BLOCK E | |
|----------------------------|----|-------------------------|-----------------------|---------------|--------------------|---------------------|----------------------|-----------------------|-----------------------|-------------------------|---------------------------|----------------------------|-----------------------------|-------------------|----------------|-----------|------|----------|---------------|----------------------|--------------------------------|------|-------------|-----------------|-------------------|-------------------|--------------------|---------------------|----------------------|-------------------------|---------------------------|------------------|---------|
| Asset and/or Income Source | | Year-End Value of Asset | | | | | | | | | | | | | Type of Income | | | | | | Amount of Income | | | | | | | | | | | Transaction | |
| SP | DC | JT | A | B | C | D | E | F | G | H | I | J | K | L | NONE | DIVIDENDS | RENT | INTEREST | CAPITAL GAINS | EXCEPTED/BLIND TRUST | Other Type of Income (Specify) | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | P, S, E |
| | | | 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 | \$5,000,001 - \$25,000,000 | \$25,000,001 - \$50,000,000 | Over \$50,000,000 | | | | | | | | None | \$1 - \$200 | \$201 - \$1,000 | \$1,001 - \$2,500 | \$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 | |
| | | | Trusts | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Deven Energy | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Deury | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Dow Chemical | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | EMC | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Edison International | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Exelon | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Exxon Mobil | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Freight-McMurray Corp | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Freight-McMurray Corp | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Goldman Sachs | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Google | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | HP | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Intel | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Johnson Controls | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Juniper Networks | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Kraft Foods | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Leaves | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | J.P. Morgan | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Mastercard | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | McKesson Corp | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name

Updon

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| BLOCK A | | BLOCK B | | | | | | | | | | | | | BLOCK C | | | | | | | BLOCK D | | | | | | | | | | | BLOCK E | |
|----------------------------|---------------------------------|-----------------------------|---|---|---|---|---|---|---|---|---|---|---|------|----------------|------|----------|---------------|----------------------|-----------------------------------|---|------------------|-----|----|---|----|-----|------|----|---|----|--|-------------|--|
| Asset and/or Income Source | | Year-End Value of Asset | | | | | | | | | | | | | Type of Income | | | | | | | Amount of Income | | | | | | | | | | | Transaction | |
| SP, DC, JT | | A | B | C | D | E | F | G | H | I | J | K | L | NONE | DIVIDENDS | RENT | INTEREST | CAPITAL GAINS | EXCEPTED/BLIND TRUST | Other Type of Income (Specify) | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | | | |
| | Trusts | None | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Merck | \$1 - \$1,000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Medco Health | \$1,001 - \$15,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | MetLife | \$15,001 - \$50,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Microsoft | \$50,001 - \$100,000 | | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Monsanto | \$100,001 - \$250,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Morgan Stanley | \$250,001 - \$500,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Morgan Stanley AMLN 50% 4-25-97 | \$500,001 - \$1,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | NRC Energy | \$1,000,001 - \$5,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Nike | \$5,000,001 - \$25,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Northolk Southern | \$25,000,001 - \$50,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Occidental Petroleum | Over \$50,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Omnicon Group | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Oreco | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Pfizer | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Philip Morris | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Praxair | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Procter & Gamble | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Prudential Financial | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Qualcomm | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Rathen | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Schlumberger | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

P S E

SCHEDULE III — ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name

W. J. J. J.

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| BLOCK A | | BLOCK B | | | | | | | | | | | | | BLOCK C | | | | | | | BLOCK D | | | | | | | | | | | BLOCK E |
|----------------------------|-------------------------|--------------------------------|---|---|---|---|---|---|---|---|---|---|---|------|----------------|------|----------|---------------|----------------------|--------------------------------|---|------------------|-----|----|---|----|-----|------|----|---|----|--|-------------|
| Asset and/or Income Source | | Year-End Value of Asset | | | | | | | | | | | | | Type of Income | | | | | | | Amount of Income | | | | | | | | | | | Transaction |
| SP, DC, JT | | A | B | C | D | E | F | G | H | I | J | K | L | NONE | DIVIDENDS | RENT | INTEREST | CAPITAL GAINS | EXCEPTED/BLIND TRUST | Other Type of Income (Specify) | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | | |
| | Trusts | None | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Staples | \$1 - \$1,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Spectra Energy | \$1,001 - \$15,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Starbucks | \$15,001 - \$50,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Target | \$50,001 - \$100,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | The Travelers Companies | \$100,001 - \$250,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Time Warner | \$250,001 - \$500,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | United Technologies | \$500,001 - \$1,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | U.S. Bancorp | \$1,000,001 - \$5,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Verizon | \$5,000,001 - \$25,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Wal-Mart | \$25,000,001 - \$50,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Wash. Agt. | Over \$50,000,000 | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Wells Fargo | NONE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Yum Brands | DIVIDENDS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Chemical Financial | RENT | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 5th 3rd Bancorp | INTEREST | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | J.P. Morgan Options | CAPITAL GAINS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | J.P. Morgan Men. & Mkt. | EXCEPTED/BLIND TRUST | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | J.P. Morgan Acct. | Other Type of Income (Specify) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Fidelity Investments | None | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Vodafone | \$1 - \$200 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | N. Trust Large Cap Fund | \$201 - \$1,000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

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| BLOCK A Asset and/or Income Source | BLOCK B Year-End Value of Asset | | | | | | | | | | | BLOCK C Type of Income | | | | | | BLOCK D Amount of Income | | | | | | | | | | | BLOCK E Transaction | | | |
|---------------------------------------|------------------------------------|---------------|--------------------|---------------------|----------------------|-----------------------|-----------------------|-------------------------|---------------------------|----------------------------|-----------------------------|---------------------------|------|-----------|------|----------|---------------|-----------------------------|--------------------------------|---|------|-------------|-----------------|-------------------|-------------------|--------------------|---------------------|----------------------|------------------------|-------------------------|---------------------------|------------------|
| | A | B | C | D | E | F | G | H | I | J | K | L | NONE | DIVIDENDS | RENT | INTEREST | CAPITAL GAINS | EXCEPTED/BLIND TRUST | Other Type of Income (Specify) | I | II | III | IV | V | VI | VII | VIII | IX | | X | XI | |
| | 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 | \$5,000,001 - \$25,000,000 | \$25,000,001 - \$50,000,000 | Over \$50,000,000 | | | | | | | | | None | \$1 - \$200 | \$201 - \$1,000 | \$1,001 - \$2,500 | \$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 |
| Trusts | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| M. Trust Mid-cap Fund | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| N. Trust Small-cap Fund | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| N. Trust Int. Equity Fund | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| N. Trust Emerging Mkts Fund | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| N. Trust Global Real Estate | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Prime Commodity Fund | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Actio Int. Equity | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Artisan Int. Value Fund | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Rowlays DT-US Bond MD 3/15/11 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Dodge & Cox Int. Stock | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Goldman Sachs Trust 4/1/11 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| GS 9M EAFE Note 8/23/10 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| HSBC 12M EAFE Bond 10/6/10 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| HSBC Mkt Div AIB 11/24/10 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EShares Cohen & Steers Realty | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EShares Cohen & Steers Energy | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EShares MSCI EAFE Index Fund | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EShares MSCI EAFE Index Fund | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EShares Russell 2000 Index Fund | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EShares Russell Midcap Index | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EShares Russell Smallcap Index | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Continuation Sheet (if needed)

Lepton

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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.

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Date 3/5/14

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.

[illegible]

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

| Position | Name of Organization |
|----------------------|--|
| Ex-Officio Bd Member | Alliance for World Class Communities |
| Limited Partner | SEU (Cyprus) Limited Partnership (Cyprus first part corp is Gen. Partner of SEU Limited Partnership) |
| Board Member | F. S. Cyprus Pdn |
| Member | For the Politics Institute Congressional Advisory Council |
| Board Member | Aspen Institute |

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; continuing participation in an employee welfare or benefit plan maintained by a former employer; or publication of a book.

[illegible]