



Filing ID #10000839

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Ms. Suzanne Bonamici  
**Status:** Member  
**State/District:** OR01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2013  
**Filing Date:** 06/20/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Managed Asset Account ⇒ Blackrock High Yield Inv. CL A	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Equity Value CL A	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Large Growth Quantitative CL A	JT	\$100,001 - \$250,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Select Large Cap Growth CL A	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Small Cap Core CL A	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ DWS RREEF Global Real Estate Securities CL A	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs Commodity Strategy CL A	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒	JT	\$15,001 - \$50,000	Dividends	\$5,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Goldman Sachs Mid Cap Value CL A				\$15,000	
Ameriprise Managed Asset Account ⇒ JP Morgan Strategic Income Opptys CL A	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Emerging Markets Debt CL A	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Intl Value CL A	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value CL A	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl Growth CL A	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Prudential Jennison Mid Cap Growth CL A	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CL A	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Municipal CL A	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Short Term Municipal Bond CL A	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CL A	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Blackrock Global Allocation mutual fund	JT	None	Dividends	\$1 - \$200	<input type="checkbox"/>
Manning & Napier Pro-Blend Extended Term mutual fund		None	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Michael H. Simon Beneficiary IRA at Ameriprise ⇒ Franklin Templeton Growth Allocation mutual fund	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Michael H. Simon Beneficiary IRA at Ameriprise ⇒ Van Eck International Investors Gold Class A mutual fund	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Michael H. Simon Royalties ⇒	SP	\$15,001 - \$50,000	Royalties	\$5,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
International Authors Society (Odd Couple royalties)				\$15,000	
Michael H. Simon Royalties ⇒ Samuel French, Inc. (Odd Couple royalties)	SP	\$15,001 - \$50,000	Royalties	\$15,001 - \$50,000	<input type="checkbox"/>
Michael H. Simon Royalties ⇒ Tams-Witmark Music Library, Inc. (Promises, Promises royalties)	SP	\$1,001 - \$15,000	Royalties	\$1,001 - \$2,500	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Ameriprise cash holding	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Gold Coins	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Insmouth Partners, LLC (motion picture production company; Hillsboro, OR; hold no investment LOCATION: Hillsboro / Washington County, OR, US DESCRIPTION: Motion picture production company; Hillsboro, OR; hold no investment	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Northwestern Mutual Life Ins. (life ins. cash value)	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Oregon State Dept. of Admin. Services, Municipal Bond	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ US Bank NA	JT	\$500,001 - \$1,000,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Neuberger Berman Socially Responsible mutual fund		None	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Suzanne's Personal Assets ⇒ OnPoint Community Credit Union (check and savings)		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index mutual fund	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Capital Opportunity Mutual Fund	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Emerging Markets Stock Index mutual fund	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Energy Mutual Fund	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard European Stock Index mutual fund	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Global ex-U.S. Real Estate Index mutual fund	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Health Care mutual fund	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Inflation-Protected Securities mutual fund	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP mutual fund	SP	\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard REIT Index mutual fund	SP	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<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?
Ameriprise Managed Asset Account ⇒ Columbia Equity Value CL A	JT	02/6/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Equity Value CL A	JT	05/17/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Equity Value CL A	JT	08/14/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Large Growth Quantitative CL A	JT	05/17/2013	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Large Growth Quantitative CL A	JT	08/14/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Large Growth Quantitative CL A	JT	11/6/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Columbia Select Large Cap Growth CL A	JT	11/6/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Small Cap Core CL A	JT	08/14/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Small Cap Core CL A	JT	11/6/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ DWS RREEF Global Real Estate Securities CL A	JT	05/17/2013	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs Mid Cap Value CL A	JT	02/6/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs Mid Cap Value CL A	JT	05/17/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs Mid Cap Value CL A	JT	08/14/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Intl Value CL A	JT	02/6/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Intl Value CL A	JT	05/17/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value CL A	JT	02/6/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value CL A	JT	05/17/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl Growth CL A	JT	02/6/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl Growth CL A	JT	08/14/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Prudential Jennison Mid Cap Growth CL A	JT	08/14/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒	JT	02/6/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Advantage Municipal CL A			(partial)		
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Municipal CL A	JT	11/6/2013	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CL A	JT	11/6/2013	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CL A	JT	11/6/2013	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
United States Judges (Administrative Office of U.S. Courts	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Member (minority interest; no control or managerial responsibility)	Insmouth Partners, LLC (motion picture production company; Hillsboro, OR; holds no investments)

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details				Inclusions		
Source	Start Date	End Date	Itinerary	Lodging?	Food?	Family?
Stanford Law School	04/25/2013	04/26/2013	Portland, OR - Stanford, CA - Portland, OR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- o Ameriprise Managed Asset Account (Owner: JT)  
LOCATION: US
- o Michael H. Simon Beneficiary IRA at Ameriprise (Owner: SP)  
LOCATION: US
- o Michael H. Simon Royalties (Owner: SP)  
LOCATION: US
- o Miscellaneous Assets Jointly Owned (Owner: JT)  
LOCATION: US
- o Suzanne's Personal Assets  
LOCATION: US
- o The Michael H. Simon Rollover IRA at Vanguard (Owner: SP)  
LOCATION: US

## 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

## COMMENTS

Assets previously listed in Schedule A as owned by "DC" are no longer listed because our children are no longer dependents.

## 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:** Ms. Suzanne Bonamici , 06/20/2014