

# UNITED STATES HOUSE OF REPRESENTATIVES

## CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

FORM A  
For use by Members, officers, and employees

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**HAND DELIVERED**

STEPHEN JOSEPH SCALISE  
(Full Name)

504-736-0946  
(Daytime Telephone)

MAY 15 PM 5:04  
(Office Use Only)

OFFICE RESOURCE CENTER

Filter ☒ Member of the U.S. State: LA  
Status House of Representatives District: 01

Officer Or Employee

Employing Office: S. HOUSE OF REPRESENTATIVES

Report Type

☒ Annual (May 15)

Amendment

Termination

Termination Date:

REGISTRATION FEE: \$200  
REGISTRATION FEE 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?	Yes <input checked="" type="checkbox"/> No <input 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)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
II. If yes, complete and attach Schedule I. 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?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	VII. If yes, complete and attach Schedule VI. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$35 from one source)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
III. If yes, complete and attach Schedule II. 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?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VIII. If yes, complete and attach Schedule VII. Did you hold any reportable positions on or before the date of filing in the current calendar year?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
IV. If yes, complete and attach Schedule III. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. If yes, complete and attach Schedule VIII. Did you have any reportable agreement or arrangement with an outside entity?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
V. If yes, complete and attach Schedule IV. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	X. If yes, complete and attach Schedule IX.	

If yes, complete and attach Schedule V.

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"/>
Exemptions-- 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"/>

**SCHEDULE I - EARNED INCOME**

Name STEPHEN JOSEPH SCALISE

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$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.

Source	Type	Amount
LOUISIANA HOUSE OF REPRESENTATIVES	SALARY	\$940
LOUISIANA STATE SENATE	SALARY	\$15,465
EVENTURE TECHNOLOGIES	SALARY	\$6,924

## SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name STEPHEN JOSEPH SCAULISE

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BLOCK A Asset and/or Income Source  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 assets or sources of income which generated more than \$200 in "unearned" income during the year. For rental property or land, provide a complete address. Provide full names of stocks and mutual funds (do not use ticker symbols). For all IRAs and other retirement plans (such as 401(k) plans) that are self-directed (i.e., plans in which you have the power, even if not exercised, to select the specific investments), provide the value and income information on each asset in the account that exceeds the reporting threshold. For retirement plans that are not self-directed, name the institution holding the account and its value at the end of the reporting period. For an active business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. For additional information, see the instruction booklet.  Exclude: Your personal residence(s) (unless there is rental income); any debt owed to you by your spouse, or by your or your spouse's child, parent or sibling; any deposits totaling \$5,000 or less in personal savings accounts; any financial interest in or income derived from U.S. Government retirement programs.  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 (JT), in the optional column on the far left.	BLOCK B Year-End Value of Asset  at close of reporting year. If you use a valuation method other than fair market value, please specify the method used. If an asset was sold and is included only because it is generated income, the value should be "None."	BLOCK C Type of Income  Check all columns that apply. For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA." For all other assets including all IRAs, indicate the type of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if asset did not generate any income during the calendar year.	BLOCK D Amount of Income  For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, including all IRAs, indicate the category of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if no income was earned or generated.	BLOCK E Transaction  Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.
MUTUAL SAVINGS AND LOAN	\$100,001 - \$250,000	INTEREST	5004-15000-1001-5000	
CAPITAL ONE	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
JOHN HANCOCK 3YR COMPOUND GIA	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
JOHN HANCOCK 10YR COMPOUND GIA	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
JH PIMCO REAL RETURN FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
JH PIMCO TOTAL RETURN FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	

## SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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JH 500 INDEX FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
JH LORD ABBETT ALL VALUE	None	DIVIDENDS	\$201 - \$1,000	S
JH LORD ABBETT MID CAP VALUE	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
JH DWS RREEF REAL ESTATE	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
JH JENNISON GROWTH	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
JH ALL CAP VALUE FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	P
JH TEMPLETON FOREIGN SMALL CO	None	DIVIDENDS	\$1 - \$200	S
JH ENERGY	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
JH AMERICAN CENTURY SMALL CO	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
JH FRANKLIN SMALL MID GROWTH	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
JH T ROWE PRICE HEALTH SCI	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
JH INTL SMALL CAP FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	P
MERRILL BANK USA	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
ML ALLIANCE BERSTEIN LARGE CAP GROWTH	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	

## SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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ML BLACKROCK LARGE CAP FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
ML BLACKROCK TOTAL RETURN FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
ML BLACKROCK VALUE FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
ML BLACKROCK INTL FUND	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
ML BLACKROCK BOND FUND	None	DIVIDENDS	\$1 - \$200	S
CISCO	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
STABLE ASSET FUND II	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
AMER FDS CAPITAL WORLD GROWTH AND INCOME	None	DIVIDENDS	\$1 - \$200	S
T ROWE PRICE BLUE CHIP GROWTH	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	P
T ROWE PRICE RETIRE 2030	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
AUL FIXED ACCOUNT (12)	None	DIVIDENDS	\$1 - \$200	S
PIMCO TOTAL RETURN (Q4)	None	DIVIDENDS	\$1 - \$200	S
FRANKLIN STRATEGIC INCOME	None	DIVIDENDS	\$1 - \$200	S
ONE AMERICA ASSET DIRECTOR	None	DIVIDENDS	\$1 - \$200	S

**SCHEDULE III - ASSETS AND "UNEARNED" INCOME**

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T ROWE PRICE EQUITY INCOME	None	DIVIDENDS	\$1 - \$200	S
T ROWE PRICE GROWTH STOCK	None	DIVIDENDS	\$1 - \$200	S
ALLIANZ NFJ SMALL CAP VALUE	None	DIVIDENDS	\$1 - \$200	S
LORD ABBETT DEVELOPING GROWTH	None	DIVIDENDS	\$1 - \$200	S
AMCENT STRATEGIC ALLOC	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	P
RUSSELL LIFEPOINTS EQGRO	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	P
FIDELITY ADV FREEDOM 2040	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	P

## SCHEDULE IV - TRANSACTIONS

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Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	JH LORD ABBETT ALL VALUE	S	04-10-08	\$1,001 - \$15,000
	JH ALL CAP VALUE FUND	P	04-10-08	\$1,001 - \$15,000
	JH TEMPLETON FOREIGN SMALL CO	S	04-10-08	\$1,001 - \$15,000
	JH INTL SMALL CAP FUND	P	04-10-08	\$1,001 - \$15,000
	ML BLACKROCK BOND FUND	S	04-10-08	\$1,001 - \$15,000
	AMER FDS CAPITAL WORLD GROWTH AND INCOME	S	04-10-08	\$1,001 - \$15,000
	T ROWE PRICE BLUE CHIP GROWTH	P	02-15-08	\$1,001 - \$15,000
	T ROWE PRICE RETIRE 2030	P	02-15-08	\$1,001 - \$15,000
	AUL FIXED ACCOUNT (12)	S	05-27-08	\$1,001 - \$15,000
	PIMCO TOTAL RETURN (Q4)	S	05-27-08	\$1,001 - \$15,000
	FRANKLIN STRATEGIC INCOME	S	05-27-08	\$1,001 - \$15,000

## SCHEDULE IV - TRANSACTIONS

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Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	ONE AMERICA ASSET DIRECTOR	S	05-27-08	\$1,001 - \$15,000
	T ROWE PRICE EQUITY INCOME	S	02-15-08	\$1,001 - \$15,000
	T ROWE PRICE GROWTH STOCK	S	02-15-08	\$1,001 - \$15,000
	ALLIANZ NFJ SMALL CAP VALUE	S	04-10-08	\$1,001 - \$15,000
	LORD ABBETT DEVELOPING GROWTH	S	04-10-08	\$1,001 - \$15,000
	AMCENT STRATEGIC ALLOC	P	05-27-08	\$1,001 - \$15,000
	RUSSELL LIFEPOINTS EQGRO	P	05-27-08	\$1,001 - \$15,000
	CISCO	P	01-25-08	\$1,001 - \$15,000
	FIDELITY ADV FREEDOM 2040	P	05-27-08	\$1,001 - \$15,000



## SCHEDULE V - LIABILITIES

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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. Exclude: Any mortgage on your personal residence (unless all or part of it is rented out); loans secured by automobiles, household furniture, or appliances; 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 close of the preceding calendar year exceeded \$10,000.

SP, DC, JT	Creditor	Type of Liability	Amount of Liability
JT	CITICARD	CREDIT CARD	\$10,001 - \$15,000
JT	REGIONS BANK	CREDIT CARD	\$15,001 - \$50,000
JT	BANK OF AMERICA	CREDIT CARD	\$15,001 - \$50,000
JT	CHASE	CREDIT CARD	\$15,001 - \$50,000
JT	GUARANTY SAVINGS BANK	PERSONAL LOAN	\$15,001 - \$50,000

## SCHEDULE VIII - POSITIONS

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Report all positions, compensated or uncompensated, held during the current calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or any business enterprise, any nonprofit organization, any labor organization, or any educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities; positions solely of an honorary nature; and positions listed on Schedule I.

Position	Name of Organization
DIRECTOR	TEACH FOR AMERICA OF NEW ORLEANS
DIRECTOR	JEFFERSON SENIOR CENTER
DIRECTOR	AMERICAN ITALIAN RENNAISSANCE FOUNDATION