

UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

FORM A
For use by Members, officers, and employees

**HAND
DELIVERED**

Josiah Robins Bonner, Jr.

202-225-4931

(Full Name)

(Daytime Telephone)

2009 MAY 15 PM 2:20

(Office Use Only)

LEGISLATIVE RESOURCE CENTER

Filer Status
☒ Member of the U.S. House of Representatives
State: AL District: 01

☐ Officer Or Employee
Employing Office:

Report Type
☒ Annual (May 15) ☐ Amendment ☐ Termination

Termination Date:

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?	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)?	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 checked="" type="checkbox"/> No <input 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 \$335 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 type="checkbox"/> No <input checked="" 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"/>	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 II - PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Name Josiah Robins Bonner, Jr.

Page 2 of 7

List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of an honorarium. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Standards of Official Conduct. A green envelope for transmitting the list is included in each Member's filing package. Employees may request a green envelope from the Clerk or use a plain envelope that is appropriately labeled.

Source	Activity	Date	Amount
The Southern Company	speech	Oct. 30, 2008	\$200

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Josiah Robins Bonner, Jr.

Page 3 of 7

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
<p>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.</p> <p>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.</p> <p>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.</p>		<p>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 the value should be "None."</p>	<p>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.</p>	<p>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.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
JT	Camden National Bank	\$1,001 - \$15,000	INTEREST	\$1 - \$200	none
	Congressional Federal Credit Union	\$1,001 - \$15,000	INTEREST	\$1 - \$200	none
JT	Whitney National Bank	\$1,001 - \$15,000	INTEREST	\$1 - \$200	none
	Pioneer Growth Shares	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	none
JT	2469 +/- acres timberland, Wilcox County, Alabama	\$1,000,001 - \$5,000,000	Other: timber sales, hunting licenses	\$100,001 - \$1,000,000	Sales, leases
JT	RBC Bank (formerly First Gulf Bank)	\$1,001 - \$15,000	INTEREST	\$1 - \$200	none

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Josiah Robins Bonner, Jr.

Page 4 of 7

	76 acres timberland, Wilcox County, Alabama	\$100,001 - \$250,000	none	NONE	none
JT	Alabama PrePaid Tuition Plan - DC 1	\$1,001 - \$15,000	NONE	NONE	none
JT	Alabama PrePaid Tuition Plan - DC 2	\$1,001 - \$15,000	None	NONE	none
JT	1st Camden Bankshares	\$15,001 - \$50,000	DIVIDENDS	\$2,501 - \$5,000	none
JT	Town and Country Bank	\$15,001 - \$50,000	INTEREST	\$1,001 - \$2,500	none
JT	RMA Money Market Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	none
JT	Oppenheimer Main Street Fund	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	none
JT	Oppenheimer Capital Appreciation	\$1,001 - \$15,000	None	NONE	none
JT	Pioneer Independence Fund	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	none
	2-11 acre lots, Baldwin County, Alabama	\$50,001 - \$100,000	None	NONE	none
SP	Cisco	\$1 - \$1,000	None	NONE	none
SP	Fannie Mae	\$1 - \$1,000	None	NONE	none
SP	Health South	\$1 - \$1,000	None	NONE	none
SP	Southern Company	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	none

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Josiah Robins Bonner, Jr.

Page 5 of 7

SP	John Hancock Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	none
SP	Pioneer Growth Shares	\$1,001 - \$15,000	None	NONE	none
DC	Cisco	\$1 - \$1,000	None	NONE	none
DC	Weyerhaeuser	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	none
DC	Fannie Mae	\$1 - \$1,000	None	NONE	none

SCHEDULE IV - TRANSACTIONS

Name Josiah Robins Bonner, Jr.

Page 6 of 7

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
JT	2469 +/- acres timberland, Wilcox County, Alabama	sales, lea	March 2008	\$250,001 - \$500,000
JT	1st Camden Bankshares	Other	January 2008	\$1,001 - \$15,000
JT	Town and Country Bank	Other	January 2008	\$1,001 - \$15,000

SCHEDULE V - LIABILITIES

Name Josiah Robins Bonner, Jr.

Page 7 of 7

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
	American Express	Revolving Credit	\$15,001 - \$50,000
JT	Chase Manhattan	Revolving Credit	\$10,001 - \$15,000
JT	Bank of America	Revolving Credit	\$10,001 - \$15,000