

**UNITED STATES HOUSE OF REPRESENTATIVES**  
**2014 FINANCIAL DISCLOSURE STATEMENT**

Form A  
For Use by Members, Officers, and Employees

Name: Joseph P. Kennedy III

Daytime Telephone: 202-225-5931

**HAND DELIVERED**  
LEGISLATIVE RESOURCE CENTER  
2015 MAY 15 AM 10:37  
OFFICE OF THE CLERK  
U.S. HOUSE OF REPRESENTATIVES  
(Office Use Only)

FILER STATUS	<input checked="" type="checkbox"/> Member of or Candidate for U.S. House of Representatives	State: <u>MA</u> District: <u>4</u>	<input type="checkbox"/> Officer or Employee	Employing Office: _____
REPORT TYPE	<input checked="" type="checkbox"/> 2014 Annual (Due: May 15, 2015)	<input type="checkbox"/> Amendment	<input type="checkbox"/> Termination	Date of Termination: _____

**PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS**

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>OR</u> b. Make more than \$200 in unearned income from any reportable asset during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$375 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$375 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	I. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	

**IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS**

IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 the report details of such a trust that benefits you, your spouse, or your 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 your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income													BLOCK E Transaction
Identify (a) each asset held for investment or production of income and with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or source of income that generated more than \$200 in "unearned" income during the year.  Provide complete names of stocks and mutual funds (do not use only ticker symbols).  For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that exceeds the reporting threshold.  For bank and other cash accounts, total the amount in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts.  For rental and other real property held for investment, provide a complete address or description, e.g., "rental property," and a city and state.  For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.  Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.  If you have a privately-traded fund that is an Excepted Investment Fund, please check the "EIF" box.  If you so choose, you may indicate that an asset or income source is that of your spouse (S), or dependent child (DC), or jointly held with anyone (JT), in the optional column on the far left.  For a detailed discussion of Schedule A requirements, please refer to the instruction booklet.		Indicate value of asset at close of the reporting period. If you use a valuation method other than fair market value, please specify the method used.  If an asset was sold during the reporting period and is included only because it generated income, the value should be "None."  *Column M is for assets held by your spouse or dependent child in which you have no interest.													Check all columns that apply. For accounts that generate tax-deferred income (such as 401(k), IRA, or 529 accounts), you may check the "Tax-Deferred" column. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check "None" if the asset generated no income during the reporting period.							For assets for which you checked "Tax-Deferred" in Block C, you may check the "None" column. For all other assets indicate the category of income by checking the appropriate box below. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check "None" if no income was earned or generated.  *Column M is for assets held by your spouse or dependent child in which you have no interest.													Indicate if the asset was purchased (P), sold (S), or exchanged (E) during the reporting period.  If only a portion of an asset was sold, please indicate the portion sold (e.g., 25%).  Leave this column blank if there are no transactions that exceeded \$1,000.
		A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED INVESTMENT FUND	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	
		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	Spouse/DC Asset over \$1,000,000*									None	\$1-\$200	\$201-\$1,000	\$1,001-\$2,800	\$2,801-\$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	Spouse/DC Asset with income over \$1,000,000*	
SP	Example: Mega Corp. Stock																																		
JT	Example: ABC Hedge Fund																																		
	Bank of America Accounts																																		
	Commonwealth of Massachusetts																																		
	457 Deferred																																		
	Compensation Plan (Smart) *																																		
	Indiv. Living America Inc. (Indiv.)																																		

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**Use additional sheets if more space is required.**

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income													BLOCK E Transaction	
SP, JT, JT	ASSET NAME	None	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E
JT	Johnson Controls Inc. Com																																			
JT	Intellicore Technologies III																																			
JT	Quintec Systems Inc. Del. Com																																			
JT	Prosource Co. Inc. Com																																			
JT	Prosource Corp. Com																																			
JT	Prosource Inc.																																			
JT	Microsoft Corp. Com																																			
JT	Merck & A. Sponsored ADR																																			
JT	Occidental Petroleum Corp. Del. Com																																			
JT	Oracle Corp. Com																																			
JT	Parametric Portfolio Partners																																			
JT	Plum Creek Timber Co. Inc.																																			
JT	Outlook																																			
JT	Rockwell Automation, INC.																																			
JT	Novartis, Novartis																																			
JT	Novartis International, Nov. Com																																			

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Use additional sheets if more space is required.

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income													BLOCK E Transaction	
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII		
		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	Spouse/DC Asset over \$1,000,000*									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-\$100,000,000	\$1,000,001-\$5,000,000,000	Over \$5,000,000	Spouse/DC Asset with income over \$1,000,000*		
	Trust U/LMD Prudence J. Bauch																																			
	WFO Sheila R. Kennedy *																																			
	Assets Incubator																																			
	WFO Trust for Trustee for JNY CO, INC																																			
	Abbott Labs																																			
	Brilliant Technologies																																			
	Advanced Biotech																																			
	Johnson Cos Inc Corp																																			
	Analox Devices Inc																																			
	Section Dickinson & Co																																			
	SEP Sullivan Ltd APB																																			
	Algonia Inc																																			
	Charm Corp																																			
	Smith Corp Corp																																			
	Boys Girls																																			
	CS/Catman's Corp Corp																																			

\*Pilar is a discretionary beneficiary and has never received any income from this trust. Pilar has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

Use additional sheets if more space is required.

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**Use additional sheets if more space is required.**



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# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income													BLOCK E Transaction								
ASSET NAME	EST.	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	P, S, S(part), or 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	Spouse/DC Asset over \$1,000,000*									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	Spouse/DC Asset with Income over \$1,000,000*									
FOR BENEVOLENT TRUST U/W															X																												
Francis A. Bunch, f/d/a																																											
Thalia Bunch Kennedy and																																											
for Dependents																																											
Assets included:																																											
State Street Bank & Trust																																											
Benevolent Trust Multi-Residence																																											
Common Trust Fund																																											
Benevolent Trust Structured Index Fund																																											
Benevolent Trust Global Com Tr Fd																																											
Benevolent Trust S&P 500 Partners, LP																																											
Benevolent Trust Global Partners LP																																											
(Capital) dist from item 11 above																																											
END of Trust U/W of																																											
Francis B. Bunch																																											

\*Pillar is a discretionary beneficiary and has never received any income from this trust. Pillar has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

Use additional sheets if more space is required.

SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset														BLOCK C Type of Income								BLOCK D Amount of Income														BLOCK E Transaction
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or 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																																					
	Spouse/DC Asset over \$1,000,000*																																					
	For Example: TRUST, U/W OF																																					
	R. Stewart, Trustee, f/d/o																																					
	Shella, Trustee, Kennedy and																																					
	for Descendants *																																					
	Parent's Inc./Rev.																																					
	State Street Bank & Trust																																					
	Investment Multi-Strategy																																					
	Common Trust Fund																																					
	Investment Structured Index RI																																					
	Investment Global Com. TR. RI																																					
	Investment Spl. RI Partners, LP																																					
	Investment Global Partners, LP																																					
	(Capital Dist. from Item 11 above)																																					
	and of Trust U/W OF																																					
	R. Stewart, Trustee																																					

\*Pillar is a discretionary beneficiary and has never received any income from this trust. Pillar has disclosed 100% of the assets of the trusts that have a value in excess of \$1,000.

Use additional sheets if more space is required.

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**Use additional sheets if more space is required**

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# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income													BLOCK E Transaction
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E
	None																																		
	Brandywine Private Equity Partners (2005) LP							X																											
	Brandywine Private Equity Partners (2006) LP							X																											
	Brandywine Private Equity Partners (2007) LP							X																											
	Brandywine Private Equity Partners (2008) LP							X																											
	Brandywine Private Equity Partners (2011) LP							X																											
	Brandywine Private Equity Partners (2012) LP							X																											
	Brandywine Private Equity Partners (2013) LP							X																											
	North Star Apartments																																		P
	Alameda Technology Inc																																		
	Georgia Stanley																																		
	Verizon Corp																																		E

Use additional sheets if more space is required.

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**Use additional sheets if more space is required.**

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income													BLOCK E Transaction	
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E	
	George B. Brewster Trust *														X																					
	U/A, dated 11/12/1914, as																																			
	Amplified w/ Francis B. Smith																																			
	W/O Stella Smith Kennedy and																																			
	her Descendants Assets Include:																																			
	Beale Street Bank & Trust																																			
	Dreyfus Treasury Prime Cash																																			
	Management Fund																																			
	Bacon Vapco Small Cap Fund																																			
	Academy PFC Ireland																																			
	Ballant Technologies																																			
	Amazon, INC.																																			
	Johnson Smith																																			
	Smith Corp.																																			
	Oscar Gold Company																																			
	OTC Carmark																																			

\*Pillar is a discretionary beneficiary and has never received any income from this trust. Pillar has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

Use additional sheets if more space is required.

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income											BLOCK E Transaction			
SP	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	GRUING ANNUITY	EXCEPTED/BLIND TRUST	TRUST (SPECIAL)	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	None	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	P, S, S(part), or E	
	None																																			
	Deere & Co.			X																																
	Blaney Malt Co.					X																														
	Scotch Inc.						X																													
	First Republic San Fran							X																											P	
	Genstar Holdings, Inc.								X																										PS	
	General Electric Co.																																			
	United Airlines Inc.																																			
	Google Inc A																																		E	
	Google Inc C																																		E	
	Johnson Controls Inc.																																		E	
	Boeing Technologies																																		E	
	Boeing Boeing Inc.																																		E	
	Alstom Technology Corp																																		E	
	McDonalds Corp																																		E	
	Boeing Inc.																																		E	
	Microsoft Corp																																		E	

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income										BLOCK E Transaction				
SP	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	INTEREST	EXCEPTED/BLIND TRUST	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	None	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	P, S, S(part), or E				
		None	\$1-\$1,000	\$1,001-\$10,000	\$10,001-\$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	Spouse/DC Asset over \$1,000,000*								\$1-\$200	\$201-\$500	\$501-\$1,000	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$10,000	\$10,001-\$25,000	\$25,001-\$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	Over \$5,000,000	Spouse/DC Asset with income over \$1,000,000*
	Monsanto Company			X																																
	Oxidant Petroleum Corp			X																																
	Orion Systems Corp.			X																																
	Pine Creek Timber Co. Inc			X																																
	Procter & Gamble Co.			X																																
	Qualcomm Inc.			X																																
	Rockwell Intl Corp			X																																
	Schlumberger Ltd			X																																
	United Parcel Service			X																																
	Wal Mart Stores			X																																
	Waste Management Inc. Del			X																																
	Wells Fargo and Company			X																																
	WPP Ltd. Reorganized AIR			X																																
	World America Reorganized AIR			X																																
	Western Communications			X																																
	Worldcom Group P/C AIR			X																																

Use additional sheets if more space is required.

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**Use additional sheets if more space is required.**

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income								BLOCK D Amount of Income								BLOCK E Transaction				
SP, JT, JT, ST	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	EXCEPTED BOND TRUST	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	None	II	III	IV	V	VI	VII	VIII	IX	X	XI	P, S, Spouse or S			
			\$0-\$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	\$50,000,001-\$1,000,000,000	\$1,000,000,001-\$1,000,000,000								\$1-\$200	\$201-\$500	\$501-\$1,000	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$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	Over \$5,000,000	
	Residential Trust U/R OF																																		
	GEORGE S. ESTATE, AS																																		
	Appointed U/R Frances G. March																																		
	U/R/a Sheila March Kennedy and																																		
	REX DECEASED																																		
	Assets Included:																																		
	State Street Bank Trust																																		
	Executive Trust Trusts Cash MGT TR																																		
	Eastern Union Small Cap Fund																																		
	Ascenture P.C. Ireland																																		
	Agilent Technologies Inc.																																		
	James Corp																																		
	Johnson Bros																																		
	Valleyview Communities																																		
	Church Corp.																																		
	Life Carecenter																																		

Piller is a discretionary beneficiary and has never received any income from this trust. During 2014 the trust was divided into two sub trusts; one for the benefit of the reporting individual and one for a family member. The assets for the trust of the other family member are not reported. Piller has disclosed 100% of the assets of the sub trust for his benefit that have a value in excess of \$1,000.

Use additional sheets if more space is required.

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**Use additional sheets if more space is required.**



# **SCHEDULE A - ASSETS & "UNEARNED INCOME"**

Name: **Joseph P. Kennedy III**

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income											BLOCK E Transaction
SP	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	INTEREST	EXCEPTED TRUST	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	None	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	P, S, SPC, or R	
	None																																
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	\$15,001-\$50,000																																
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**Use additional sheets if more space is required.**

# SCHEDULE B - TRANSACTIONS

Name: Joseph P. Kennedy III

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Report any purchase, sale, or exchange transaction that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the capital gains box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

\* Column K is for assets solely held by your spouse or dependent child.

Report any purchase, sale, or exchange transaction that exceeded \$1,000 in the reporting period or any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.										Type of Transaction		Date		Amount of Transaction										
SP, DC, JT	Asset	Purchase	Sale	Partial Sale	Exchange	Check Box if Capital Gain Exceeded \$200	AGD/401(k) or 529 plan, if applicable	A	B	C	D	E	F	G	H	I	J	K						
SP	Example Map Corp Stock			X		X	SPW		X									Over \$1,000,000* (Spouse/CC/Asset)						
	SPDA INTL Index Sec LMD Sup																							
	CU 1 (Page 3, Item 1)		X				5/3/14	X																
	SPDA Russel Small Cap Index Sec																							
	JMD S&P 500 (Page 3, Item 2)		X				5/3/14	X																
	F Home Price Structured Research																							
	Comm TR PD (Page 3, Item 5)		X				5/3/14	X																
	SPDA US Bond Index Sec LMD Sup																							
	Purd CU 1 (Page 3, Item 7)		X				5/3/14	X																
	P/del/ly Emuliv Income Fund (Page 3, Item 2)		X				2/13/14	X																
JT	Amazon Com INC (Page 3, Item 12)	X					9/18/14	X																
JT	CVG/Carewatt Corp (Page 4, Item 2)			X		X	9/18/14	X																
JT	Genetac Holdings INC (Page 4, Item 9)	X					9/18/14	X																
JT	Slised Autocares INC (Page 4, Item 10)			X		X	9/18/14	X																
JT	Google INC A (Page 4, Item 11)			X		X	9/18/14	X																
JT	Proctera1 Automation INC (Page 5, Item 14)	X					9/18/14	X																
	Autopage Search (Page 7, Item 7)	X					9/18/14		X															
	Amazon Com INC (Page 7, Item 8)	X					9/18/14		X															
	CVG/Carewatt Com INC (Page 7, Item 16)		X			X	9/18/14		X															
	General Electric Co (Page 8 Item 4)			X		X	9/18/14		X															

Use additional sheets if more space is required.

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Use additional sheets if more space is required.

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Use additional sheets if more space is required.

# SCHEDULE B - TRANSACTIONS

Name: Joseph P. Kennedy III

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please check "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

\* Column K is for assets solely held by your spouse or dependent child.

Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.										Type of Transaction		Date		Amount of Transaction												
Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and describe the capital gain income on Schedule A.										Purchase	Sale	Partial Sale	Exchange	Check Box if Capital Gain Exceeded \$200	MO/Day/Year, or bi-weekly, if applicable	A 100-\$149,999	B 150-\$249,999	C 250-\$499,999	D 500-\$999,999	E 1,000-\$2,499,999	F 2,500-\$4,999,999	G 5,000-\$9,999,999	H 10,000-\$24,999,999	I 25,000-\$49,999,999	J Over \$50,000,000	K Over \$1,000,000* (Spouse/CC Asset)
SP, DC, JT	Asset	SP	Example	Legal Prop. Stock																						
	Technology P/C ABC Exchange																									
	for Technology P/C, SP ABC (Page 21, Item 16)								X																	
	Technology P/C, SP ABC (Page 21, Item 16)								X																	
	Marocchino Technology (Page 21, Item 4)								X																	
	Applinet Technology (Page 21, Item 11) Spinolet																									
	Spinolet, Kevins/ABC Technology (Page 24, Item 12)								X																	
	Spinolet Corp. (Page 21, Item 12)								X																	
	Spinolet Mobile Corp. (Page 24, Item 4)								X																	
	Google, Inc. A Spinolet/Google, Inc. C (Page 24, Item 8+9)								X																	
	Redwood, DTH, Corp. (Page 25, Item 10)								X																	
	XYZ COR INC (Page 25, Item 12)								X																	
	Acme Management, INC. (Page 25, Item 20)								X																	
	Technology P/C ABC Exchange, Inc.																									
	Technology P/C, SP ABC (Page 26, Item 2)								X																	
	Technology P/C, SP ABC (Page 26, Item 2)								X																	
	Technology P/C, SP ABC (Page 26, Item 2+4)								X																	

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**INCOME LIMITS AND PROHIBITED INCOME:** The 2014 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$28,955. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) were totally prohibited.

Use additional sheets if more space is required.

# SCHEDULE D - LIABILITIES

Name: Joseph P. Kennedy III

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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 your dependent child. Mark the highest amount owed during the reporting period. Members: Members are required to report all liabilities secured by real property including mortgages on their personal residences. Exclude: Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. \*Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A	B	C	D	E	F	G	H	I	J	K
				\$10,001-\$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	Over \$1,000,000* (Spouse/DC Liability)
	Example First Bank of Wilmington, DE	5/98	Mortgage on Rental Property, Dover, DE				X							
JT	Wells Fargo Bank, N.A.	04/2013	Mortgage on Personal Residence, DC						X					
JT	Wells Fargo Bank, N.A.	07/2013	Mortgage on Personal Residence, MA					X						
SP	Wells Fargo Bank, N.A.	11/2006	Student Loan		X									
SP	Bank of America, N.A.	9/2006	Student Loan		X									
SP	Harvard University, Cambridge, MA	9/2006	Student Loan	X										

## SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: 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
Member Board of Directors	Robert P. Kennedy Memorial
Director	Robert P. Kennedy Children's Action Corps
Member Board of Directors	Robert Kennedy Foundation
Member Advisory Board	Children and Women's Hospital - Ann Romney Center for Neurological Diseases
Member Senior Advisory Committee	Harvard University Institute of Politics

Use additional sheets if more space is required.



# SCHEDULE F - AGREEMENTS

Name: Joseph P. Kennedy III

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Identify the date, parties to, and general terms of any agreement or arrangement that you have 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; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement
NONE		

# SCHEDULE G - GIFTS

Report the source (by name), a brief description, and the value of all gifts totaling more than \$375 received by you, your spouse, or your dependent child from any source during the year. Exclude: Gifts from relatives, gifts of personal hospitality from an individual, local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$150 or less need not be added towards the \$375 disclosure threshold. Note: The gift rule (House Rule 26, clause 5) prohibits acceptance of gifts except as specifically provided in the rule.

Source	Description	Value
Example: Mr. Joseph Smith, Arlington, VA	Silver Platter (determination of personal friendship received from the Ethics Committee)	\$400
NONE		

Use additional sheets if more space is required.

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**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 (FGDA, 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 the filer.

**Use additional sheets if more space is required.**

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**Use additional sheets if more space is required.**