



Filing ID #10010759

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Steve Lindbeck
Status: Congressional Candidate
State/District: AK00

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2016
Filing Date: 05/12/2016
Period Covered: 01/01/2015– 04/30/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alaska Permanent Fund Dividend ⇒ Alaska Permanent Fund Dividend DESCRIPTION: Alaska Permanent Fund Dividend 2015		\$1,001 - \$15,000	Alaska PFD	None	\$2,501 - \$5,000
Alaska USA accounts		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$1 - \$200
Ginsburg-Lindbeck Living Trust ⇒ CASH		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Ginsburg-Lindbeck Living Trust ⇒ for		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Ginsburg-Lindbeck Living Trust ⇒ Fidelity Spartn TfBond Fund		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Ginsburg-Lindbeck Living Trust ⇒ Money Market PGR		\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Ginsburg-Lindbeck Living Trust ⇒		\$15,001 - \$50,000	Dividends	\$201 -	\$1,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Oppenheimer Senior				\$1,000	\$2,500
Ginsburg-Lindbeck Living Trust ⇒ Pimco National Intemediate		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Ginsburg-Lindbeck Living Trust ⇒ Pimco Income Class D		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Ginsburg-Lindbeck Living Trust ⇒ Pimco Investment Grade		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Investment accounts ⇒ Morgan Stanley ⇒ Blackrock Core Bond PTF A		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Investment accounts ⇒ Morgan Stanley ⇒ CASH		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Investment accounts ⇒ Morgan Stanley ⇒ E V Income Fund of Boston A		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Investment accounts ⇒ Morgan Stanley ⇒ Invesco Equal WGHTD S&P 500 A		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Investment accounts ⇒ Morgan Stanley ⇒ Invesco Global Core Equity A		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
Investment accounts ⇒ Morgan Stanley ⇒ Invesco Premier INST		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Investment accounts ⇒ Morgan Stanley ⇒ Invesco Small Cap Value A		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Investment accounts ⇒ Morgan Stanley ⇒ Investco Comstock A		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Investment accounts ⇒ Morgan Stanley ⇒ MSIF Active INTL Allocatin A		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Investment accounts ⇒ Morgan Stanley ⇒ MSIF Growth A		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
Investment accounts ⇒ Morgan Stanley ⇒ MSIF Small Company Growth INST		\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Investment accounts ⇒ Morgan Stanley ⇒ MSIF TR LTD Duration A		\$50,001 - \$100,000	Dividends	None	\$1,001 - \$2,500
Investment accounts ⇒ Morgan Stanley ⇒ Western Asset Core Plus BD FI		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Investment accounts ⇒ Wells Fargo ⇒ Wells Fargo & Company (WFC)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ Alaska USAA (Steve IRA)		\$1,001 - \$15,000	None		
IRA ⇒ Morgan Stanley (SEL inherited IRA)		\$50,001 - \$100,000	Interest	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ ABB Ltd (ABB)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Alphabet Inc. - Class A (GOOGL)		\$15,001 - \$50,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Alphabet Inc. - Class C Capital Stock (GOOG)		\$15,001 - \$50,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Apple Inc. (AAPL)		\$15,001 - \$50,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ AT&T Inc. (T)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Cash		\$100,001 - \$250,000	Interest	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ ConocoPhillips (COP)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ E.I. du Pont de Nemours and Company (DD)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Exxon Mobil Corporation (XOM)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒		\$1,001 - \$15,000	Dividends	Not	Not

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ford Motor Company (F)				Applicable	Applicable
IRA ⇒ KMS IRA Steve ⇒ General Electric Company (GE)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Intel Corporation (INTC)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ JP Morgan Chase & Co. (JPM)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ MetLife, Inc. (MET)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Nike, Inc. (NKE)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Novartis AG (NVS)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Olin Corporation (OLN)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ PGR		\$15,001 - \$50,000	Interest	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Time Warner Inc. New (TWX)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Total S.A. (TOT)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Unilever PLC (UL)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ UnitedHealth Group Incorporated Common Stock (UNH)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Verizon Communications Inc. (VZ)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS IRA Steve ⇒ Vodafone Group Plc - American Depositary Shares each		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
representing ten Ordinary Shares (VOD)					
IRA ⇒ KMS IRA Steve ⇒ Walt Disney Company (DIS)		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
IRA ⇒ KMS- Roth IRA- Patty ⇒ CASH		\$1,001 - \$15,000	Interest	Not Applicable	Not Applicable
IRA ⇒ Roth IRA ⇒ KMS- Roth IRA- Steve ⇒ CASH		\$1,001 - \$15,000	Interest	Not Applicable	Not Applicable
IRA ⇒ SEP ⇒ CASH		\$500,001 - \$1,000,000	Interest	Not Applicable	Not Applicable
IRA ⇒ SEP ⇒ PGR		\$15,001 - \$50,000	Interest	Not Applicable	Not Applicable
IRA ⇒ SEP ⇒ T Rowe Price Real Estate		\$50,001 - \$100,000	Dividends	Not Applicable	Not Applicable
Retirement Accounts ⇒ John Hancock- APTI ⇒ John Hancock		\$100,001 - \$250,000	Tax-Deferred		

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Alaska Public Telecommunications Inc.	salary		\$115,389
The General Income Trust (Klukwan)	spouse professional services	\$	N/A
Rasmuson Foundation	Spouse professional services	N/A	N/A
Alaska Children's Trust	Spouse professional services	\$	N/A
Best Beginnings	Spouse professional services	N/A	N/A
Alyeska Pipeline Service Company	Spouse professional services	\$	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
United Way of Anchorage	Spouse professional services	\$	N/A
State of Alaska Retirement and Benefits	Spouse pension	\$2,720.64	\$8,161.92
Koniag, Inc.	Spouse professional services	N/A	N/A
Leisnoi	Spouse professional services	N/A	N/A
Seldovia Native Association	Spouse professional services	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Alaska World Affairs Council

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 2005	The McClatchy Company and Stephen E. Lindbeck	Pension retirement benefit from former employer

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> Alaska Permanent Fund Dividend Ginsburg-Lindbeck Living Trust Investment accounts LOCATION: US Investment accounts ⇒ Morgan Stanley LOCATION: US Investment accounts ⇒ Wells Fargo LOCATION: US IRA
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- IRA ⇒ KMS IRA Steve
- IRA ⇒ KMS- Roth IRA- Patty
- IRA ⇒ Roth IRA
- IRA ⇒ Roth IRA ⇒ KMS- Roth IRA- Steve
- IRA ⇒ SEP
- Retirement Accounts
- Retirement Accounts ⇒ John Hancock- APTI

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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

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: Steve Lindbeck , 05/12/2016