

# UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2009 FINANCIAL DISCLOSURE STATEMENT

FORM A  
For use by Members, officers, and employees

**HAND  
DELIVERED**

STEPHEN JOSEPH SCALISE

(Full Name)

504-736-0946  
(Daytime Telephone)

2010 JUN 24 AM 9:33  
OFFICE USE ONLY

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

☐ Officer Or Employee  
Employing Office:

Report Type ☐ Annual (May 15) ☒ Amendment

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

Name STEPHEN JOSEPH SCALISE

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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	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	AMCENT STRATEGIC ALLOC	S	No	12-01-09	\$1,001 - \$15,000
	FIDELITY ADV FREEDOM 2040	S	No	12-02-09	\$1,001 - \$15,000
	JH 500 INDEX FUND	S	No	12-09-09	\$1,001 - \$15,000
	JH ALL CAP VALUE FUND	S	No	12-09-09	\$1,001 - \$15,000
	JH AMERICAN CENTURY SMALL CO	S	No	12-09-09	\$1,001 - \$15,000
	JH DWS REEF REAL ESTATE	S	No	12-09-09	\$1,001 - \$15,000
	JH ENERGY	S	No	12-09-09	\$1,001 - \$15,000
	JH FRANKLIN SMALL MID GROWTH	S	No	12-09-09	\$1,001 - \$15,000
	JH INTL MALL CAP FUND	S	No	12-09-09	\$1,001 - \$15,000
	JH JENNISON GROWTH	S	No	12-09-09	\$1,001 - \$15,000
	JH LORD ABBETT MID CAP VALUE	S	No	12-09-09	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	JH PIMCO REAL RETURN	S	No	12-09-09	\$1,001 - \$15,000
	JH PIMCO TOTAL RETURN	S	No	12-09-09	\$1,001 - \$15,000
	JH T ROWE PRICE HEALTH SCI	S	No	12-09-09	\$1,001 - \$15,000
	JOHN HANCOCK 10YR COMPOUND GIA	S	No	12-09-09	\$1,001 - \$15,000
	JOHN HANCOCK 3YR COMPOUND GIA	S	No	12-09-09	\$1,001 - \$15,000
	MERRILL BANK USA	S	No	12-14-09	\$1,001 - \$15,000
	ML ALLIANCE BERSTEIN LARGE CAP GROWTH	S	No	12-14-09	\$1,001 - \$15,000
	ML BLACKROCK INTL FUND	S	No	12-14-09	\$1,001 - \$15,000
	ML BLACKROCK LARGE CAP FUND	S	No	12-14-09	\$1,001 - \$15,000
	ML BLACKROCK TOTAL RETURN FUND	S	No	12-14-09	\$1,001 - \$15,000
	ML BLACKROCK VALUE FUND	S	No	12-14-09	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	MUTUAL SAVINGS AND LOAN	S	No	01-07-09	\$100,001 - \$250,000
	RUSSELL LIFEPOINTS EQGRO	S	No	04-09-09	\$1,001 - \$15,000
	STABLE ASSET FUND II	S	No	04-09-09	\$1,001 - \$15,000