

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Patrick Meehan

Status: Member State/District: PA07

FILING INFORMATION

Filing Type: Annual Report

Filing Year: 2015

Filing Date: 05/16/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|----------------------|-------------------|--------|----------------|
| 403b Plan ⇒ AM FDS EURO PAC GRW | \$1,001 - \$15,000 | Tax-Deferred | | |
| 403b Plan ⇒ Conestoga SM CP | \$1,001 - \$15,000 | Tax-Deferred | | П |
| 403b Plan ⇒ LINC STBL VAL | \$1,001 - \$15,000 | Tax-Deferred | | |
| 403b Plan ⇒ PIMCO Total RES INST | \$1,001 - \$15,000 | Tax-Deferred | | |
| 403b Plan ⇒ Vanguard GR INC INV | \$15,001 - \$50,000 | Tax-Deferred | | |
| 403b Plan ⇒ Vanguard GR INDX FND IMV | \$15,001 - \$50,000 | Tax-Deferred | | |
| 403b Plan ⇒ Vanguard GR INDX INST | \$1,001 - \$15,000 | Tax-Deferred | | |
| 403b Plan ⇒ | \$1,001 - \$15,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|---------------------|-------------------|-----------------|----------------|
| Vanguard INST INDX | | | | | |
| 403b Plan ⇒ Vanguard MDCP INDX | | \$1,001 - \$15,000 | Tax-Deferred | | |
| 403b Plan ⇒ Vanguard TARGT RET 25 | | \$15,001 - \$50,000 | Tax-Deferred | | |
| 403b Plan ⇒ Vanguard WINSR II FND INV | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Bank of America IRA | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Blackrock INS DM INDX | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Delaware County, PA 457b Plan ⇒ Fid Contra | | \$1,001 - \$15,000 | Tax-Deferred | | <u>~</u> |
| Delaware County, PA 457b Plan ⇒ Fid OTC | | \$1,001 - \$15,000 | Tax-Deferred | | ▽ |
| Delaware County, PA 457b Plan ⇒ NW Fd Inst Svc | | \$1,001 - \$15,000 | Tax-Deferred | | ▽ |
| Delaware County, PA 457b Plan ⇒ NW LgCap Gr | | \$1,001 - \$15,000 | Tax-Deferred | | ✓ |
| Delaware County, PA 457b Plan ⇒ SEI S P 500 Indx E | | \$1,001 - \$15,000 | Tax-Deferred | | ▽ |
| Franklin Mint FCU Accounts | JT | \$1,001 - \$15,000 | Interest | \$201 - \$1,000 | |
| Hilliard Lyons GF | | \$1 - \$1,000 | Dividends | \$201 - \$1,000 | |
| NFS-FMTC IRA Rollover | | None | Tax-Deferred | | |
| Susquehanna Bank Accounts | JT | \$1,001 - \$15,000 | Interest | \$201 - \$1,000 | П |
| Vanguard 401k PL Lifestar Modified Growth Fund * Asset class details available at the bottom of this form | | None | Tax-Deferred | | ✓ |

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

SCHEDULE B: TRANSACTIONS

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------------|---------------------|---------------------|
| Delaware County, PA 457b Plan ⇒ Fid Contra | | 05/15/2015 | S (partial) | \$1,001 - \$15,000 | |
| Delaware County, PA 457b Plan ⇒ Fid OTC | | 05/15/2015 | S (partial) | \$1,001 - \$15,000 | П |
| Delaware County, PA 457b Plan ⇒ NW Fd Inst Svc | | 05/15/2015 | S (partial) | \$1,001 - \$15,000 | |
| Delaware County, PA 457b Plan ⇒ NW LgCap Gr | | 05/15/2015 | S (partial) | \$1,001 - \$15,000 | П |
| Delaware County, PA 457b Plan ⇒ SEI S P 500 Indx E | | 05/15/2015 | S (partial) | \$1,001 - \$15,000 | П |
| Delaware County, PA 457b Plan ⇒ Vanguard 401k PL Lifestar Mod Growth Fund | | 08/3/2015 | S | \$15,001 - \$50,000 | П |
| Hilliard Lyons GF | | 03/10/2015 | S (partial) | \$1,001 - \$15,000 | П |

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

SCHEDULE C: EARNED INCOME

| Source | Туре | Amount |
|-------------------------|---------------|--------|
| West Chester University | Spouse Salary | N/A |
| Mercy Home Healthcare | Spouse Salary | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|--------------------------------|---------------|---------------|--------------------------|
| JT | Wells Fargo Bank | April 2015 | Home Mortgage | \$250,001 - \$500,000 |
| JT | Blue Sky American Express Card | Dec 2015 | Credit Card | \$10,000 - \$15,000 |

SCHEDULE E: Positions

| Position | Name of Organization |
|------------------|--------------------------------|
| Memorial Council | United States Holocaust Museum |

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

| Trip Details | | | Inclusions | | | | |
|------------------------------------|---------------|------------|--|---------------------|----------|----------|----------|
| Source | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| Main Street Partnership | 07/17/2015 | 07/19/2015 | Washington, DC - Cambridge, MD - Washington, DC | 0 | ▽ | <u>~</u> | ∀ |
| Franklin Center - Ripon Society | 08/2/2015 | 08/9/2015 | Philadelphia, PA - Prague, Czech Republic - Philadelphia, PA | 2 | ~ | <u> </u> | ▽ |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- o 403b Plan
- o Delaware County, PA 457b Plan

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

C Yes No

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?

∇es 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

 $\overline{\mathbb{M}}$ 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: Hon. Patrick Meehan, 05/16/2016