AUG 2 9 2014

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U.S. HOUSE OF REPRESENTATIVES

# UNITED STATES HOUSE OF REPRESENTATIVES
## FINANCIAL DISCLOSURE STATEMENT

**FORM B**

For New Members, Candidates, and New Employees

**Name:** Melvin E. Lewey

**Daytime Telephone:** _____

| FILER STATUS | | |
|---|---|---|
| ☒ | New Member of or Candidate for U.S. House of Representatives<br>Candidates - Date of Election: 3 June 2014 | State: CA<br>District: 16 |
| ☐ | New Officer or Employee<br>Employing Office: | |

☐ Check if Amendment

Period Covered: January 1, _____ to _____.

(signature) (Office Use Only)

A $200 penalty shall be assessed against any individual who files more than 30 days late.

## 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? **or**
  **b.** Make more than $200 in unearned income from any reportable asset during the reporting period?
    Yes ☒ No ☐

**E.** Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?
  Yes ☒ No ☐

**B.** 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 ☒ No ☐

**F.** Do you have any reportable agreements or arrangements with an outside entity?
  Yes ☐ No ☒

**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 ☐ No ☒

**J.** Did you receive compensation of more than $5,000 from a single source in the current year and two prior years?
  Yes ☐ No ☒

**ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"**

**THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE**

## EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS

**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 that benefits 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? Do not answer "yes" unless you have first consulted with the Committee on Ethics.
  Yes ☐ No ☒

# SCHEDULE A – ASSETS & "UNEARNED INCOME"

| BLOCK A | BLOCK B | BLOCK C | BLOCK D |
|---|---|---|---|
| Assets and/or Income Sources | Value of Asset | Type of Income | Amount of Income |

**Block A instructions:** 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 which 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 (SP) 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.

**Block B instructions:** 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 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.

**Block C instructions:** Check all columns that apply. For assets for which you checked "Tax-Deferred" in Block C, you may check the "None" column. Check "None" if the asset generated no income during the reporting period.

**Block D instructions:** For assets for which you checked "Tax-Deferred" in Block C, you may check the "None" column. "Column XII is for assets held by your spouse or dependent child in which you have no interest.

## Block B – Value of Asset

Columns: A None | B $1-$1,000 | C $1,001-$15,000 | D $15,001-$50,000 | E $50,001-$100,000 | F $100,001-$250,000 | G $250,001-$500,000 | H $500,001-$1,000,000 | I $1,000,001-$5,000,000 | J $5,000,001-$25,000,000 | K $25,000,001-$50,000,000 | L Over $50,000,000 | M Spouse/DC Asset over $1,000,000*

## Block C – Type of Income

NONE | DIVIDENDS | RENT | INTEREST | CAPITAL GAINS | EXCEPTED/BLIND TRUST | TAX-DEFERRED | Other Type of Income (Specify: e.g., Partnership Income or Farm Income)

## Block D – Amount of Income (Current Year / Preceding Year)

Columns (each year): I None | II $1-$200 | III $201-$1,000 | IV $1,001-$2,500 | V $2,501-$5,000 | VI $5,001-$15,000 | VII $15,001-$50,000 | VIII $50,001-$100,000 | IX $100,001-$1,000,000 | X $1,000,001-$5,000,000 | XI Over $5,000,000 | XII Spouse/DC Income over $1,000,000*

### Entries

| Asset | Block B | Block C | Block D Current Year | Block D Preceding Year |
|---|---|---|---|---|
| **Example:** ABC Hedge Fund | C ($1,001-$15,000) — EIF | Partnership Income | III ($201-$1,000) | III ($201-$1,000) |
| Simon & Schuster | — | Royalties | — | — |
| Mega Corp Stock | — | — | — | — |
| USAA Bnds-Checking | D ($15,001-$50,000) | INTEREST | II ($1-$200) | III ($201-$1,000) |
| USAA Federal (Savings) | D ($15,001-$50,000) | INTEREST | III ($201-$1,000) | III ($201-$1,000) |
| MERCO Credit Union Act | C ($1,001-$15,000) | INTEREST | II ($1-$200) | II ($1-$200) |
| American Express Stock | C ($1,001-$15,000) | DIVIDENDS | II ($1-$200) | II ($1-$200) |
| GE Stock | D ($15,001-$50,000) | DIVIDENDS | III ($201-$1,000) | III ($201-$1,000) |

Use additional sheets if more space is required.

# SCHEDULE A -- ASSETS & "UNEARNED INCOME"

**BLOCK A** – Assets and/or Income Sources
**BLOCK B** – Value of Asset
**BLOCK C** – Type of Income
**BLOCK D** – Amount of Income (Current Year / Preceding Year)

Block B value codes: A = None; B = $1-$1,000; C = $1,001-$15,000; D = $15,001-$50,000; E = $50,001-$100,000; F = $100,001-$250,000; G = $250,001-$500,000; H = $500,001-$1,000,000; I = $1,000,001-$5,000,000; J = $5,000,001-$25,000,000; K = $25,000,001-$50,000,000; L = Over $50,000,000; M = Spouse/DC Asset over $1,000,000

Block D amount codes: I = None; II = $1-$200; III = $201-$1,000; IV = $1,001-$2,500; V = $2,501-$5,000; VI = $5,001-$15,000; VII = $15,001-$50,000; VIII = $50,001-$100,000; IX = $100,001-$1,000,000; X = $1,000,001-$5,000,000; XI = Over $5,000,000; XII = Spouse/DC income over $1,000,000

| Asset Name | Value (Block B) | Type of Income (Block C) | Current Year (Block D) | Preceding Year (Block D) |
|---|---|---|---|---|
| Microsoft Stock | D | Dividends | III | III |
| IMAX Stock | C | None | I | I |
| Harley Davidson Stock | B | Dividends | II | II |
| Bank of America Stock | C | Dividends | II | II |
| Wells Fargo Stock | C | Dividends | II | III |
| Annaly Capital Stock | D | Dividends | III | III |
| Armour Residential Stock | C / D | Dividends / Interest | IV | V |
| Samson Gas and Oil Stock | | None | I | None |
| Apple Stock | B | Dividends | I | I |
| USAA Universal Life | C | None | I | I |
| UBS Bank USA Deposit | | None | I | I |
| Loan to Mel Lewey for law | | Tax-Deferred | | |
| American Funds Roth IRA | | Tax-Deferred | | |
| AMCAP Fund - Class A | C | Tax-Deferred | I | I |
| AMCAP Fund - Class B | C | | I | I |

Use additional sheets if more space is required.