

# UNITED STATES HOUSE OF REPRESENTATIVES FINANCIAL DISCLOSURE STATEMENT FOR CALENDAR YEAR 2007

**FORM A** Page 1 of 9  
For use by Members, officers, and employees

William Franklin Shuster

(Full Name)

202-225-2431

(Daytime Telephone)

2007 MAY 13 PM 4:04

(Office Use Only)

**Filer Status** ☒ Member of the U.S. House of Representatives State: PA District: 09

☐ Officer Or Employee Employing Office:

**Report Type** ☒ Annual (May 15)

☐ Amendment

☐ Termination

Termination Date:

**NOTE TO MEMBERS**  
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?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$305 and not otherwise exempt)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule I.		VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$305 from one source)?	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?	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?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule II.		IX. Did you have any reportable agreement or arrangement with an outside entity?	Yes <input type="checkbox"/> No <input checked="" 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?	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.	
If yes, complete and attach Schedule III.			
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?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>		
If yes, complete and attach Schedule IV.			
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>		
If yes, complete and attach Schedule V.			

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

<b>Trusts--</b> 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"/>
<b>Exemptions--</b> 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 <input type="checkbox"/> No <input checked="" type="checkbox"/>

**HAND DELIVERED**

*ME*

**SCHEDULE I - EARNED INCOME**

Name William Franklin Shuster

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$200 or more during the preceding calendar year. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000.

Source	Type	Amount
Blair Family Solutions	Spouse Salary	N/A
Aseracare Hospice	Spouse Salary	N/A

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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BLOCK A Asset and/or Income Source		BLOCK B Year-End Value of Asset	BLOCK C Type of Income	BLOCK D Amount of Income	BLOCK E Transaction
<p>Identify (a) each asset held for investment or production of income with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other assets or sources of income which generated more than \$200 in "unearned" income during the year. For rental property or land, provide a complete address. Provide full names of stocks and mutual funds (do not use ticker symbols). For all IRAs and other retirement plans (such as 401(k) plans) that are self directed (i.e., plans in which you have the power, even if not exercised, to select the specific investments), provide the value and income information on each asset in the account that exceeds the reporting threshold. For retirement plans that are not self-directed, name the institution holding the account and its value at the end of the reporting period. For an active business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. For additional information, see the instruction booklet.</p> <p>Exclude: Your personal residence(s) (unless there is rental income); any debt owed to you by your spouse, or by your or your spouse's child, parent or sibling; any deposits totaling \$5,000 or less in personal savings accounts; any financial interest in or income derived from U.S. Government retirement programs.</p> <p>If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC) or is jointly held (JT), in the optional column on the far left.</p>		<p>at close of reporting year. If you use a valuation method other than fair market value, please specify the method used. If an asset was sold and is included only because it is generated income, the value should be "None."</p>	<p>Check all columns that apply. Check "None" if asset did not generate any income during the calendar year. If other than one of the listed categories, specify the type of income by writing a brief description in this block. (For example: Partnership income or Farm Income)</p>	<p>For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, indicate the category of income by checking the appropriate box below. Dividends, even if reinvested, should be listed as income. Check "None" if no income was earned.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
DC	5 S LLC-General Partner of Shuster Family Limited Partnership	\$1,001 - \$15,000	RENT and Interest Income	\$1 - \$200	
DC	American Washington Mutual Investors Fund A	None	DIVIDENDS	\$201 - \$1,000	S
	Blairmont Club LLC	\$1,001 - \$15,000	Other: PARTNERSHIP	NONE	
DC	CBF Aggressive Growth Emp Port	\$50,001 - \$100,000	None	NONE	
	1990-1992 Alt Cx				
DC	CBF Aggressive Growth Emp Port 1987-1989 Alt Cx	\$15,001 - \$50,000	None	NONE	
	Congressional Federal Credit Union	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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JT	M & T Bank #015004198383471	\$1 - \$1,000	INTEREST	\$1 - \$200	
JT	M & T Bank #015004201526538	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
JT	M & T Bank Certificate of Deposit #031003915199557	\$1,001 - \$15,000	INTEREST	\$201 - \$1,000	
DC	M & T Bank Certificates of Deposit	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
DC	M & T Bank Savings	\$1 - \$1,000	INTEREST	\$1 - \$200	
JT	M & T Bank Checking #3951302383	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
DC	Oppenheimer Convertible Securities Fund	None	CAPITAL GAINS	\$1 - \$200	S
DC	Oppenheimer Quest Opportunity Value Fund A & B	None	CAPITAL GAINS	\$1 - \$200	S
DC	Rite Aid Corporation	None	None	NONE	S
DC	Rite Aid Corporation	None	None	NONE	S
	S2 & L2 Partnership East Freedom, PA.	\$250,001 - \$500,000	RENT/INTEREST	\$50,001 - \$100,000	
	SEI Cash Balance	None	None	NONE	
	SEI Core Fixed Income Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	SEI Emerging Markets Debt Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SEI Emerging Markets Equity Fund	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$2,501 - \$5,000	PS(part)
SEI High Yield Bond Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
SEI International Equity Fund	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$2,501 - \$5,000	PS(part)
SEI International Fixed Income Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
SEI Large Cap Growth Fund	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	P
SEI Large Cap Value Fund	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	PS(part)
SEI PA Municipal Bond Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	P
SEI Prime Obligation Fund	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SEI Small Cap Growth Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SEI Small Cap Value Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
SEI Tax Free Fund	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SEI Tax Managed Large Cap	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	PS(part)
SEI Tax Managed Small Cap	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
Shuster Family Limited Partnership Formerly Shuster Rentals	\$100,001 - \$250,000	RENT and Interest Income	\$201 - \$1,000	

**SCHEDULE III - ASSETS AND "UNEARNED" INCOME**

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JT	UBS Cash Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

# SCHEDULE IV - TRANSACTIONS

Name William Franklin Shuster

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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 or series of transactions exceeded \$1,000. Include transactions that resulted in a loss. 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. Provide a brief

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	SEI Large Cap Value Fund	PS(part)	16 times	\$1,001 - \$15,000
	SEI Large Cap Growth Fund	P	15 times	\$1,001 - \$15,000
	SEI International Equity Fund	PS(part)	13 times	\$1,001 - \$15,000
	SEI Emerging Markets Equity Fund	PS(part)	16 times	\$1,001 - \$15,000
	SEI International Fixed Income Fund	P	8 times	\$1,001 - \$15,000
	SEI Tax Managed Large Cap	PS(part)	10 times	\$1,001 - \$15,000
	SEI PA Municipal Bond Fund	P	30 times	\$1,001 - \$15,000
DC	American Washington Mutual Investors Fund A	S	06-21-07	\$1,001 - \$15,000
DC	Rite Aid Corporation	S	06-21-07	\$1,001 - \$15,000
DC	Rite Aid Corporation	S	06-21-07	\$1,001 - \$15,000
DC	Oppenheimer Quest Opportunity Value Fund A & B	S	06-21-07	\$1,001 - \$15,000

# FOOTNOTES

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Number	Section / Schedule	Footnote	This note refers to the following item
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1

Schedule III

S2 & L2 ownership represents a 60% interest in the following assets and liabilities:

S2 & L2 Partnership  
East Freedom, PA

a. Cash - \$88,372

b. Commercial real estate

RD 1 Box 316-D

East Freedom, PA 16637

(rented to Thomas Holding Co for auto dealership) \$1,300,000 - \$1,500,000

c. Mortgage and other debt - \$623,760

d. Other liabilities - \$2,465

2

Schedule III

The interest in the Shuster Family Limited Partnership is comprised of a 19.8% in the following assets:

Shuster Family  
Limited Partnership

a. Cash in checking and savings - \$89,967

b. Amounts due from rental agent - \$3,006

c. Family farm and rental residence located at 825 Ritchey Road, Everett, PA 15537 (approx 100 acres) - \$500,000 - \$1,000,000

d. Amount due to rental agent \$43,892



# FOOTNOTES

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Number	Section / Schedule	Footnote	This note refers to the following item
3	Schedule III	<p>5S LLC is the general partner in the Shuster Family Limited Partnership of which 20% is owned by William F. Shuster. The following are the assets and liabilities of the company:</p> <p>a. Advances made on behalf of clients - \$43,892</p> <p>b. Cash - \$4,219</p> <p>c. Investment in Shuster Family Limited Partnership - \$1,000 - \$2,500</p>	5S LLC
4	Schedule III	The Blaimont Club LLC is a private dining club with book value net worth of \$31,250 of which William F. Shuster owns 2%.	The Blaimont Club LLC
5	Schedule III	Represents 529 plan for college age dependent child -\$20,797 withdrawn for qualified educational expenses.	CBF Aggressive Growth Emp Port 1987-1989 Alt Cx