



Filing ID #10014463

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Tom O'Halleran  
**Status:** Congressional Candidate  
**State/District:** AZ01

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2016  
**Filing Date:** 01/23/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Inc. (AAPL)	SP	\$15,001 - \$50,000	Tax-Deferred		
Arizona State Retirement System		Undetermined	None		
BMO Harris Bank Account	SP	\$1,001 - \$15,000	None		
Caterpillar, Inc. (CAT)	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Bank Accounts	JT	\$15,001 - \$50,000	None		
Chicago Teachers Pension Fund	SP	Undetermined	None		
Freeport-McMoRan, Inc. (FCX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA - Cash, BDP, MMFs	SP	\$1,001 - \$15,000	None		
Newmont Mining Corporation (NEM)	SP	\$1,001 - \$15,000	Tax-Deferred		
O'Halleran Commodities Pension and Trust dated 1980 ⇒		\$500,001 - \$1,000,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Land in Yavapai County, Arizona					
LOCATION: Yavapai County, AZ, US					
DESCRIPTION: Market Value					
O'Halleran Family Trust ⇒ Primary Personal Residence		\$1,000,001 - \$5,000,000	None		
LOCATION: Village of Oak Creek, AZ, US					
Silver Wheaton Corp Common Shares (SLW)	SP	\$1,001 - \$15,000	Tax-Deferred		
Whole Life Insurace - Mass Mutual	SP	\$100,001 - \$250,000	None		

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Arizona State Retirement System	Pension Payment	\$2,065.00	\$4,595.52
Chicago Teachers Pension Fund	Pension Payment - Spouse	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Verde River Basin Partnership (uncompensated)

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2001	Tom O'Halleran and Arizona State Retirement System	Pension plan agreement between Tom O'Halleran and Arizona State Retirement System.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- O'Halleran Commodities Pension and Trust dated 1980
- O'Halleran Family Trust

## 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:** Tom O'Halleran , 01/23/2017