



Filing ID #10013195

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Ann Kirkpatrick
Status: Member
State/District: AZ01

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2015
Filing Date: 06/20/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Arizona State Credit Union Accounts	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Curley & Allison LLP Partnership Interest	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: Phoenix/Maricopa, AZ, US DESCRIPTION: Interest in Law Partnership					
Edward Jones IRA ⇒ Cash		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Edward Jones IRA ⇒ SPDR S&P 500 ETF TR UNIT SERIES I S&P DEPOSITORY		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Edward Jones ROTH IRA ⇒ Cash		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Edward Jones ROTH IRA ⇒ iShares S&P 500 Index Fund		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity IRA ⇒ Cash	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity IRA ⇒ Fidelity NASDAQ Composite Index	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity IRA ⇒ Spartan Total Market Index Fund Adv Class	SP	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Penn Mutual Whole Life Insurance	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Vanguard Investments ⇒ Vaguard Tax Exempt Money Market	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard Investments ⇒ Vanguard 500 Index Fund Admiral Shares	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Investments ⇒ Vanguard Total Stock Market Index Fund	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Wells Fargo Bank Accounts	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo IRA ⇒ Cash	SP	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo SIMPLE IRA ⇒ Cash	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo SIMPLE IRA ⇒ Wells Fargo Advantage Emerging Growth Fund	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

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

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones IRA ⇒ SPDR S&P 500 ETF TR UNIT SERIES I S&P DEPOSITORY		Quarterly	P	\$15,001 - \$50,000	
Edward Jones ROTH IRA ⇒ IShares S&P 500 Index Fund		Quarterly	P	\$1,001 - \$15,000	
Fidelity IRA ⇒ Fidelity NASDAQ Composite Index	SP	12/11/2015	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity IRA ⇒ Spartan Total Market Index Fund Adv Class	SP	12/18/2015	P	\$1,001 - \$15,000	
Vanguard Investments ⇒ Vanguard 500 Index Fund Admiral Shares	JT	04/15/2015	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard Investments ⇒ Vanguard 500 Index Fund Admiral Shares	JT	09/9/2015	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Investments ⇒ Vanguard Tax Exempt Money Fund	JT	04/15/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Investments ⇒ Vanguard Tax Exempt Money Fund	JT	10/19/2015	P	\$1,001 - \$15,000	
Vanguard Investments ⇒ Vanguard Tax Exempt Money Fund	JT	11/9/2015	P	\$1,001 - \$15,000	
Vanguard Investments ⇒ Vanguard Total Stock Market Index Fund	JT	05/11/2015	P	\$1,001 - \$15,000	

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Curley & Allison, LLP	spouse earnings from law partnership	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Bank	June 2006	Mortgage on principal residence	\$250,001 - \$500,000
JT	Wells Fargo Bank Visa Credit Card	Various	Credit card charges	\$15,001 - \$50,000
JT	Bank of America	June 2015	Credit card advance	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Edward Jones IRA
- Edward Jones ROTH IRA
- Fidelity IRA (Owner: SP)
- Vanguard Investments (100% Interest) (Owner: JT)
LOCATION: US
- Wells Fargo IRA (Owner: SP)
- Wells Fargo SIMPLE IRA (Owner: JT)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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

☐ 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?

☐ 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: Hon. Ann Kirkpatrick , 06/20/2016