



Filing ID #10015023

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Stephen F. Lynch
Status: Member
State/District: MA08

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2016
Filing Date: 05/5/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3 Jason Terrace	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Boston, MA, US					
403(b) ⇒ American Funds Euro-Pacific		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ American Funds Growth Fund		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ American Funds Income Funds		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Blackrock Small Cap Growth		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Fidelity Balanced Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Fidelity Contra Fund		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
403(b) ⇒ Oppenheimer Developing Markets		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
55 G Street	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Boston, MA, US					
Bank of America	JT	\$1 - \$1,000	None		<input type="checkbox"/>
East Boston Savings Bank	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
IRA ⇒ Cisco Systems, Inc. (CSCO)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Dell Technologies Inc. Class V (DVMT)		\$1 - \$1,000	None		<input type="checkbox"/>
IRA ⇒ Intel Corporation (INTC)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Morgan Stanley Institutional Fund Growth Portfolio		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Morgan Stanley Money Market Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MS Money Market Fund increased in value as a result of a stock exchange transaction on September 7, 2016 when Dell Inc. acquired EMC					
IRA ⇒ Pioneer Equity Income Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Pioneer Mid-Cap Growth Fund		\$1,001 - \$15,000	Tax-Deferred		<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?
IRA ⇒ EMC Corporation (EMC)		09/7/2016	E	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Dell acquired EMC on September 7, 2016, in a cash/stock exchange. Cash was deposited to the Morgan Stanly Money Market Fund.					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
South Boston Community Health Center	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	East Boston Savings Bank	Refinanced 2011	Mortgage on Primary Residence	\$250,001 - \$500,000
JT	Ocwen Financial Corporation	September 2013	Mortgage on Rental Property	\$100,001 - \$250,000
	COMMENTS: Rental Property -- 3 Jason Terrace, South Boston, Ma			
JT	Congressional Federal Credit Union	November 2008	Home Equity Line of Credit	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors	Colonel Daniel Marr Boys & Girls Club
Board of Directors	South Boston Boys Club

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

- 403(b)
- IRA

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

COMMENTS

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. Stephen F. Lynch , 05/5/2017