

# UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

FORM A  
For use by Members, officers, and employees

**HAND  
DELIVERED**

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Lloyd Doggett

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2009 MAY 15 AM 11:44

(Full Name) \*

(Daytime Telephone)

OFFICE (Office Use Only)  
U.S. HOUSE OF REPRESENTATIVES

LEGISLATIVE RESOURCE CENTER

*MC*

Filer Status ☒ Member of the U.S. House of Representatives State: TX District: 25

☐ Officer Or Employee Employing Office:

Report Type ☒ Annual (May 15) ☐ Amendment ☐ Termination

Termination Date:

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 \$335 and not otherwise exempt)? If yes, complete and attach Schedule VI.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
II. If yes, complete and attach Schedule I. 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 checked="" type="checkbox"/> No <input type="checkbox"/>	VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$335 from one source)? If yes, complete and attach Schedule VII.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
III. If yes, complete and attach Schedule II. 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"/>	VIII. Did you hold any reportable positions on or before the date of filing in the reporting period? If yes, complete and attach Schedule VIII.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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? If yes, complete and attach Schedule IV.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule IX.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period? If yes, complete and attach Schedule V.	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.	

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

Trusts-- 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"/>
Exemptions-- 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 Standards of Official Conduct.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

# SCHEDULE I - EARNED INCOME

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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
Texas ERS	Annuity	\$64,906
Institute for Educational Leadership	Spouse Salary	N/A

**SCHEDULE II - PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA**

Name Lloyd Doggett

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List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of an honorarium. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Standards of Official Conduct. A green envelope for transmitting the list is included in each Member's filing package. Employees may request a green envelope from the Clerk or use a plain envelope that is appropriately labeled.

Source	Activity	Date	Amount
The Connell Company	Speech	Dec. 1, 2008	\$2,000
The Soap and Detergent Association	Speech	Dec. 15, 2008	\$2,000

# 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. For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA." For all other assets including all IRAs, indicate the type of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if asset did not generate any income during the calendar year.</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, including all IRAs, indicate the category of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if no income was earned or generated.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
	1157 San Bernard St, Austin, TX	\$250,001 - \$500,000	RENT	\$15,001 - \$50,000	
	1200 Baylor #401, Austin TX	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	
	21.12 Acres, Northern Dona Ana City, NM (1/24 interest)	None	Rent/CAPITAL GAINS	\$5,001 - \$15,000	S
	3800 Kennelwood Austin, TX	\$250,001 - \$500,000	None	NONE	
	6734 Spicewood Springs, Travis Co. TX	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	
	711 N. Piedras, El Paso, TX (1/12 interest)	None	Rent/CAPITAL GAINS	\$5,001 - \$15,000	S

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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8.16 acres Lohman's Ford Crossing Road., Travis Co., TX	\$15,001 - \$50,000	None	NONE	
AIM Basic Balanced Fund	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	P
AIM Small Company Growth	\$100,001 - \$250,000	Capital Gains	\$5,001 - \$15,000	
American Century Ultra Fund	\$50,001 - \$100,000	DIVIDENDS	\$201 - \$1,000	
Anadarko Petroleum	\$1,001 - \$15,000	Dividends	\$1 - \$200	
Apache Corp	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	
Applied Materials Inc	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
AT&T Corp Com	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	P
Bank of America Corp	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	P
Baxter International	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Bristol-Myers Squibb Co	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Burlington Northern Santa Fe Common	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
CBS Corp	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Charles Schwab Corp	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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Checkpoint Software	\$15,001 - \$50,000	None	NONE	
Chevron Corp Com	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	P
Cisco Systems Inc	\$1,001 - \$15,000	None	NONE	
Citigroup Inc	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Coca-Cola Company	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	P
Comcast	\$1,001 - \$15,000	None	\$1 - \$200	
Computer Sciences Corp	\$15,001 - \$50,000	None	NONE	
Congressional Federal Credit Union	\$15,001 - \$50,000	Interest	\$201 - \$1,000	
Credit Suisse Cap Apprec Fund	\$100,001 - \$250,000	DIVIDENDS	\$201 - \$1,000	
Dell Computer Corp	\$1,001 - \$15,000	None	NONE	
Dominion	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
Energy East	None	Dividends/CAPITAL GAINS	\$5,001 - \$15,000	S
Exxon Mobil Corp Com	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	P
First Energy	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	P

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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Franklin Mutual Shares Fund	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	P
General Electric Co Com	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	P
Guaranty Bank	\$100,001 - \$250,000	INTEREST	\$201 - \$1,000	Inheritance - Estate Alyce Doggett

Hasan Abu-Issa Note (N. Piedras Sale)	\$1,001 - \$15,000	INTEREST	\$201 - \$1,000	
Home Depot Inc Com	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	P
Honeywell International	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
INSD MUN INCM TR SR 86 Semi-Annual	\$1,001 - \$15,000	Interest	\$1 - \$200	
Intel Corp Com	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	
International Business Machines	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	P
International Paper Co.	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
J P Morgan Chase & Co Com	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	P
Janus Fund	\$100,001 - \$250,000	DIVIDENDS	\$1,001 - \$2,500	P
Janus Perkins Mid Cap Value Fund	\$50,001 - \$100,000	Dividends/Gains	\$5,001 - \$15,000	P
Janus Twenty Fund	\$50,001 - \$100,000	None	NONE	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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Jensen Portfolio Fund	\$15,001 - \$50,000	Dividends	\$1 - \$200	
Johnson & Johnson	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	P
Luminex Corp Com New	\$15,001 - \$50,000	None	NONE	
Merck & Co Inc	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	P
Mineral Interest, McFarland Tract, Ward Co., TX	\$1,001 - \$15,000	Royalty	\$201 - \$1,000	
Nokia Corp Sponsored ADR	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	
Nuveen Inter Duration Muni Bond Fund	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Nuveen Multi-Manager (formerly Large Cap Value Fund)	\$15,001 - \$50,000	Dividends/Gains	\$201 - \$1,000	
Nuveen Muni Adv Fund	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	
Oakmark International Fund	\$250,001 - \$500,000	Dividends/Gains	\$5,001 - \$15,000	P
One Earth Bank Holdings (preoperating funds)	\$1,001 - \$15,000	None	NONE	
Oppenheimer Strategic	\$1,001 - \$15,000	None	NONE	
Oracle Corp Com	\$15,001 - \$50,000	None	NONE	
Pfizer Inc	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	P



# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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PPG Industries Inc	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	P
Price Science and Technology	\$100,001 - \$250,000	None	NONE	
Proctor & Gamble Co	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	P
Prosperity Bank	\$50,001 - \$100,000	Interest	\$201 - \$1,000	
Schwab Muni Money Fund	\$50,001 - \$100,000	DIVIDENDS	\$2,501 - \$5,000	S, P
Selected American Shares	\$50,001 - \$100,000	Dividends	\$1 - \$200	
SprintNextel Corp	\$1,001 - \$15,000	None	NONE	
Supertex Inc	\$15,001 - \$50,000	None	NONE	
Texas Instruments Inc	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
TIAA-CREF Retirement - Global Equities	\$15,001 - \$50,000	None	NONE	P
TIAA-CREF Retirement - Real Estate	\$100,001 - \$250,000	None	NONE	P
TIAA-CREF Retirement - Stock	\$15,001 - \$50,000	None	NONE	P
Time Warner Inc Com	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
Union Pacific Corp	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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Vanguard Convertible Securities	\$500,001 - \$1,000,000	DIVIDENDS	\$15,001 - \$50,000	P/Inheritance - Estate Alyce Doggett
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Vanguard Growth Index Fund Admiral	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	P
Vanguard Int. Term Tax-Exempt Fund Admiral	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	P/ Inheritance - Estate Alyce Doggett

Vanguard Long-Term Corp Admiral	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	
Vanguard Ltd. Term Tax-Exempt Fund Admiral	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	P/ Inheritance - Estate Alyce Doggett

Vanguard PRIMECAP Fund Admiral	\$250,001 - \$500,000	Dividends/Gains	\$15,001 - \$50,000	P
Vanguard Selected Value Fund	\$250,001 - \$500,000	Dividends/Gains	\$5,001 - \$15,000	P
Vanguard Short Term Bond Index	\$100,001 - \$250,000	DIVIDENDS	\$1,001 - \$2,500	P/Inheritance - Estate Alyce Doggett

Vanguard Short Term Investment Grade	None	DIVIDENDS	\$1 - \$200	S/Inheritance - Estate Alyce Doggett
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Vanguard Small-Cap Index Fund Inv	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	P
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# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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Vanguard Tax Exempt MM	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	P/Inheritance - Estate Alyce Doggett
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Vanguard Total Stock Market	\$250,001 - \$500,000	Dividends/Gains	\$5,001 - \$15,000	P/Inheritance - Estate Alyce Doggett
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Vanguard U.S. Growth Fund Admiral	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	
Vanguard Wellesley Income fund	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
Vanguard Windsor II Fund	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	P/Inheritance - Estate Alyce Doggett

Verizon Communications Com	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Virtus Value Opportunity Fund (formerly Phoenix Focused Value Fund)	\$100,001 - \$250,000	Dividends/Gains	\$1,001 - \$2,500	P

Wachovia	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	P
Waste Management Inc	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Weitz Value	\$250,001 - \$500,000	None	NONE	
Western Union	\$1,001 - \$15,000	Dividends	\$1 - \$200	
Whole Foods Mkt Inc	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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		\$1,001 - \$15,000	None	\$1 - \$200	
Xerox Corporation					

# SCHEDULE IV - TRANSACTIONS

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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 exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. 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. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	Exxon Mobil	P	Periodic Reinvestment	\$1,001 - \$15,000
	Franklin Mutual Shares Fund	P	Periodic Reinvestment	\$1,001 - \$15,000
	JP Morgan Chase	P	Periodic Reinvestment	\$1,001 - \$15,000
	PPG Industries	P	Periodic Reinvestment	\$1,001 - \$15,000
	Proctor & Gamble	P	Periodic Reinvestment	\$1,001 - \$15,000
	Wachovia	P	Periodic Reinvestment	\$1,001 - \$15,000
	Oakmark International Fund	P	Periodic Reinvestment	\$1,001 - \$15,000
	Vanguard Growth Index Fund Admiral	P	Periodic Reinvestment	\$1,001 - \$15,000
	Vanguard Int. Term Tax - Exempt Fund Admiral	P	Periodic Reinvestment	\$1,001 - \$15,000
	Vanguard Ltd. Term Tax - Exempt Fund Admiral	P	Periodic Reinvestment	\$1,001 - \$15,000
	Vanguard Convertible Securities	P	Periodic Reinvestment	\$15,001 - \$50,000

# SCHEDULE IV - TRANSACTIONS

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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 exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. 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. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	Vanguard Selected Value	P	Periodic Reinvestment	\$15,001 - \$50,000
	Vanguard Total Stock Market Ind Inv	P	Periodic Reinvestment	\$1,001 - \$15,000
	Vanguard Windsor II	P	Periodic Reinvestment	\$1,001 - \$15,000
	Janus Fund	P	Dividend Reinvestment	\$1,001 - \$15,000
	Chevron Corp Com	P	Dividend Reinvestment	\$1,001 - \$15,000
	Coca-Cola Company	P	Dividend Reinvestment	\$1,001 - \$15,000
	International Business Machines	P	Dividend Reinvestment	\$1,001 - \$15,000
	Merck & Co Inc	P	Dividend Reinvestment	\$1,001 - \$15,000
	AT&T	P	Dividend Reinvestment	\$1,001 - \$15,000
	TIAA-CREF Retirement - Stock	P	Monthly	\$1,001 - \$15,000
	TIAA-CREF Retirement - Global Equities	P	Monthly	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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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 exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. 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. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	Vanguard PRIMECAP Fund Admiral	P	Dividend Reinvestment	\$15,001 - \$50,000
	Schwab Muni Money Fund	P	1-16-08	\$15,001 - \$50,000
	Schwab Muni Money Fund	S	1-22-08	\$15,001 - \$50,000
	Schwab Muni Money Fund	P	1-23-08	\$1,001 - \$15,000
	Schwab Muni Money Fund	P	4-23-08	\$1,001 - \$15,000
	Schwab Muni Money Fund	P	6-2-08	\$1,001 - \$15,000
	Schwab Muni Money Fund	S	6-19-08	\$1,001 - \$15,000
	Schwab Muni Money Fund	P	7-31-08	\$1,001 - \$15,000
	Schwab Muni Money Fund	P	9-18-08	\$15,001 - \$50,000
	Schwab Muni Money Fund	P	11-4-08	\$15,001 - \$50,000
	Schwab Muni Money Fund	P	11-17-08	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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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 exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. 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. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	Schwab Muni Money Fund	P	12-19-08	\$15,001 - \$50,000
	Schwab Muni Money Fund	P	12-11-08	\$1,001 - \$15,000
	Schwab Muni Money Fund	S	12/31/08	\$1,001 - \$15,000
	Schwab Muni Money Fund	P	12-15-08	\$1,001 - \$15,000
	Energy East	S	9-17-08	\$15,001 - \$50,000
	First Energy	P	Periodic Reinvestment	\$1,001 - \$15,000
	Home Depot	P	Periodic Reinvestment	\$1,001 - \$15,000
	Johnson & Johnson	P	Periodic Reinvestment	\$1,001 - \$15,000
	Pfizer, Inc.	P	Periodic Reinvestment	\$1,001 - \$15,000
	Schwab Muni Money Fund	P	Periodic Reinvestment	\$1,001 - \$15,000
	AIM Basic Balanced Fund	P	Dividend Reinvestment	\$1,001 - \$15,000



# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	General Electric Co Com	P	Dividend Reinvestment	\$1,001 - \$15,000
	TIAA-CREF Retirement - Real Estate	P	Monthly	\$1,001 - \$15,000
	Vanguard Small Cap Index Fund	P	Periodic Reinvestment	\$1,001 - \$15,000
	Vanguard Tax Exempt MM	P	Periodic Reinvestment	\$1,001 - \$15,000
	Bank of America	P	Dividend Reinvestment	\$1,001 - \$15,000
	21.12 Acres, Northern Dona Ana City, NM (1/24 interest)	S	4-7-08	\$1,001 - \$15,000
	711 N. Piedras, El Paso, TX (1/12 interest)	S	10-30-08	\$1,001 - \$15,000
	Vanguard Short Term Bond Index	P	Periodic Reinvestment	\$1,001 - \$15,000
	Vanguard Short Term Bond Index	P	6/23/08	\$15,001 - \$50,000
	Virtus Value Opportunity Fund	P	Dividend Reinvestment	\$1,001 - \$15,000
	Janus Perkins Mid Cap Value Fund	P	Dividend Reinvestment	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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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 exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. 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. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	Vanguard Short Term Investment Grade	S	6/23/08	\$15,001 - \$50,000

# SCHEDULE V - LIABILITIES

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or dependent child. Mark the highest amount owed during the year. Exclude: Any mortgage on your personal residence (unless all or part of it is rented out); loans secured by automobiles, household furniture, or appliances; and liabilities owed to a spouse, or the child, parent, or sibling of you or your spouse. Report "revolving charge accounts" (i.e., credit cards) only if the balance at the close of the preceding calendar year exceeded \$10,000.

SP, DC, JT		Type of Liability	Amount of Liability
	Creditor		
	Liberty Bank, Austin	Letter of Credit on 6734 Spicewood Springs	\$250,001 - \$500,000

# **SCHEDULE VII - TRAVEL PAYMENTS AND REIMBURSEMENTS**

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Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$335 received by you, your spouse, or a dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense, and the amount of time, if any, that was not at the sponsor's expense. Disclosure is required regardless of whether the expenses were reimbursed or paid directly by the sponsor. Exclude: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to you.

Source	Date(s)	Point of Departure-- Destination--Point of Return	Lodging? (Y/N)	Food? (Y/N)	Was a Family Member Included? (Y/N)	Days not at sponsor's expense
The Congressional Program of the Aspen Institute	Aug 14-24	US - France - US	Y	Y	Y	4 days