



Filing ID #10008154

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Nancy Pelosi  
**Status:** Member  
**State/District:** CA12

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2014  
**Filing Date:** 07/7/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
11 Zinfandel Lane - Home & Vineyard	JT	\$5,000,001 - \$25,000,000	Grape Sales	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: St. Helena/Napa, CA, US					
1600 Atlas Peak Road - Real Estate Investment	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Napa/Napa, CA, US					
25 Point Lobos - Commercial Property	SP	\$5,000,001 - \$25,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US					
45 Belden Place - Four Story Commercial Building	SP	\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US					
723 Mule Ears Court - Townhome	JT	\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Sugar Bowl/Placer, CA, US					
Alcatel-Lucent (ALU)	SP	None	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alcoa Inc. (AA)	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Apple Inc. (AAPL)	SP	\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Aristotle LLC	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Ltd. Partnership Investment in Aristotle Publishing, Inc.					
Attensity Group Inc. Preferred Stock	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Investment in Hosted Analytical Software Application - Palo Alto, CA					
Auberge du Soleil	SP	\$1,000,001 - \$5,000,000	Partnership income	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Rutherford/Napa, CA, US DESCRIPTION: Ltd. Partnership Investment in Resort Hotel					
Bank of America - Checking Account	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
Bank of America - Checking Account	JT	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
Bank of America - Checking Account	SP	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Washington, DC					
BF Enterprises Common Stock New (BFET)	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Bidclerk Inc. Preferred Stock (Currently known as iSqFt)	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Investment in Contracting Industry Online Services Company - South San Francisco, CA					
Blucora, Inc. (BCOR)	SP	None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Borel Real Estate Company	SP	\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: San Mateo/San Mateo, CA, US DESCRIPTION: Ltd. Partnership Interest in Shopping Center					
Broadcom Corporation - Class A (BRCM)	SP	None	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
City Car Services LLC	SP	\$500,001 - \$1,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Hingham/Plymouth, MA, US DESCRIPTION: Ltd. Partnership Investment in Limousine Company					
City National Bank - Checking Account	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
City National Securities - Brokerage Money Market Account	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Clean Energy Fuels Corp. (CLNE)	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Collab.net LLC	SP	\$1 - \$1,000	Partnership Loss	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Ltd. Partnership Investment in Collaborative Software Development Company					
Comcast Corporation - Class A (CMCSA)	SP	\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Congressional Credit Union - Checking Account		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Washington, DC					
Dow Chemical Company (DOW)	SP	None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
EDI Associates	SP	\$250,001 - \$500,000	Partnership Income	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Sonoma/Sonoma, CA, US DESCRIPTION: Ltd. Partnership Investment in El Dorado Hotel					
Emulex Corporation (ELX)	SP	None	None		<input checked="" type="checkbox"/>
Entropic Communications, Inc. (ENTR)	SP	None	None		<input checked="" type="checkbox"/>
Facebook, Inc. - Class A (FB)	SP	\$250,001 - \$500,000	None		<input type="checkbox"/>
Financial Leasing Services	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Investment Consulting Company					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Forty-Five Belden Corporation	SP	\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Investment Management Company					
Global Ambassador Concierge LLC	SP	\$15,001 - \$50,000	Partnership Loss	\$1 - \$200	<input type="checkbox"/>
LOCATION: Washington, DC, US DESCRIPTION: Ltd. Partnership Interest in Concierge Services for International Travelers					
Granite Ventures LP	SP	\$50,001 - \$100,000	Partnership Loss	\$1 - \$200	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Ltd. Partnership Interest in Venture Capital Company Investing in Communications & Software					
Hertz Global Holdings, Inc. (HTZ)	SP	\$250,001 - \$500,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: 500 call options with a strike price of \$22 and an expiration date of 1/15/16					
Ibiquity Digital Corporation Preferred Stock	SP	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Investment in Digital Radio Systems Company - Columbia, MD					
Interactive Brokers Group, Inc. (IBKR)	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Internet Cap Group Common Stock	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Internet Cap Group Common Stock					
iSqFt (Formerly known as Bidclerk Inc.)	SP	\$1 - \$1,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: South San Francisco, CA, US DESCRIPTION: Investment in Contracting Industry Online Services Company - South San Francisco, CA					
Marquetry Antiques	SP	\$100,001 - \$250,000	Partnership Loss	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Ltd. Partnership Interest in Antiques Company					
Matthews International Mutual Fund	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
McGrath RentCorp (MGRC)	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ModusLink Global Solutions, Inc (MLNK)	SP	None	None		<input type="checkbox"/>
Morningstar, Inc. (MORN)	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Mosher Partners LP	SP	\$250,001 - \$500,000	Partnership Income	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Sacramento/Sacramento, CA, US DESCRIPTION: Undeveloped Residential Real Estate Investment					
Nautilus Leasing Services	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Container Leasing Company					
Nine Forty Five Battery LLC	SP	\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: General Partner in 945 Battery Street Office Building					
Odyssey LLC	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Ltd. Partnership Interest in Venture Capital Investment Firm					
Piatti Restaurant Company	SP	\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Tiburon/Marin, CA, US DESCRIPTION: Ltd. Partnership Investment in Restaurant Company					
QUALCOMM Incorporated (QCOM)	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Robert Half International Inc. (RHI)	SP	None	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Russell Ranch LLC	SP	\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Sacramento/Sacramento, CA, US DESCRIPTION: Ltd. Partner in Undeveloped Residential Real Estate Investment					
Salesforce.com Inc (CRM)	SP	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Shutterfly, Inc. (SFLY)	SP	None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Sierra Vista Baseline Investors LP	SP	\$250,001 - \$500,000	Partnership Loss	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Sacramento/Sacramento, CA, US DESCRIPTION: Ltd. Partnership in Undeveloped Real Estate Investment					
Speakeasy Investors LP	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
LOCATION: Seattle/King, WA, US DESCRIPTION: Ltd. Partnership Investment in DSL Broadband Services Provider					
Stoneridge LLC	SP	\$250,001 - \$500,000	Partnership Loss	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Sacramento/Sacramento, CA, US DESCRIPTION: Ltd. Partner in Undeveloped Residential Real Estate Investment					
SunEdison, Inc. (SUNE)	SP	\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>
Thirteen Hundred One Sansome LLC	SP	\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: General Partner in 1301 Sansome Street Office Building					
Tripath Technology Inc. Common Stock	SP	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Common Stock Not Actively Traded					
Trivium LLC	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Ltd. Partnership Investment in E-Business Software Solutions Company					
Union Bank of California - Checking Account	SP	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
Union Bank of California - Money Market Account	SP	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
Union Bank of California - Pelosi Trust Checking Account	SP	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
United Football League	SP	\$5,000,001 - \$25,000,000	None		<input type="checkbox"/>
LOCATION: Jacksonville/Duval, FL, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Ltd. Partnership Interest in Football League					
United Football League Sacramento Mountain Lions Team	SP	\$5,000,001 - \$25,000,000	Partnership Loss	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Sacramento/Sacramento, CA, US DESCRIPTION: Ltd. Partnership Interest in Football Franchise					
Visa Inc. (V)	SP	\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Walt Disney Company	SP	\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: 100 call options with a strike price of \$90 and an expiration date of 1/15/16					
Wells Fargo Bank - Checking Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
Yerac Associates	SP	\$100,001 - \$250,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Ltd. Partner in Investment Fund					

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Alcoa Inc. (AA)	SP	10/23/2014	S	\$15,001 - \$50,000	<input type="checkbox"/>
Blucora, Inc. (BCOR)	SP	10/23/2014	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Broadcom Corporation - Class A (BRCM)	SP	10/23/2014	S	\$1,001 - \$15,000	<input type="checkbox"/>
Dow Chemical Company (DOW)	SP	10/23/2014	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Emulex Corporation (ELX)	SP	10/23/2014	S	\$1,001 - \$15,000	<input type="checkbox"/>
Entropic Communications, Inc. (ENTR)	SP	10/23/2014	S	\$1,001 - \$15,000	<input type="checkbox"/>
Hertz Global Holdings, Inc (HTZ)		11/5/2014	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Purchase of 50 call options with a strike price of \$22 and an expiration date of 1/15/16					
Hertz Global Holdings, Inc (HTZ)		11/6/2014	P	\$50,001 - \$100,000	
DESCRIPTION: Purchase of 150 call options with a strike price of \$22 and an expiration date of 1/15/16					
Hertz Global Holdings, Inc (HTZ)		11/25/2014	P	\$100,001 - \$250,000	
DESCRIPTION: Purchase of 200 call options with a strike price of \$22 and an expiration date of 1/15/16					
Hertz Global Holdings, Inc (HTZ)		11/28/2014	P	\$50,001 - \$100,000	
DESCRIPTION: Purchase of 100 call options with a strike price of \$22 and an expiration date of 1/15/16					
McGrath RentCorp (MGRC)	SP	09/22/2014	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
DESCRIPTION: Contribution of shares held personally to The Paul & Nancy Pelosi Charitable Foundation via transfer between brokerage accounts.					
Robert Half International Inc. (RHI)	SP	09/22/2014	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
DESCRIPTION: Contribution of shares held personally to The Paul & Nancy Pelosi Charitable Foundation via transfer between brokerage accounts.					
Shutterfly, Inc. (SFLY)	SP	10/23/2014	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
SunEdison, Inc. (SUNE)	SP	10/24/2014	P	\$100,001 - \$250,000	
Visa Inc. (V)		12/29/2014	S (partial)	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sale of 1000 Shares					
Visa Inc. (V)		12/30/2014	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sale of 500 Shares					
Walt Disney Company (DIS)		11/28/2014	P	\$1,001 - \$15,000	
DESCRIPTION: Purchase of 8 call options with a strike price of \$90 and an expiration date of 1/15/16					
Walt Disney Company (DIS)		12/10/2014	P	\$50,001 - \$100,000	
DESCRIPTION: Purchase of 92 call options with a strike price of \$90 and an expiration date of 1/15/16					

## SCHEDULE C: EARNED INCOME



Source	Type	Amount
Financial Leasing Services	Spouse Salary	N/A
Fairfield Associates	Spouse Management Fee	N/A
Forty-Five Belden Corporation	Spouse Management Fee	N/A
Isolep Enterprises	Spouse Management Fee	N/A
Yerac Associates	Spouse Management Fee	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Union Bank of California	February 2002	Mortgage on 11 Zinfandel Lane, St. Helena, CA	\$1,000,001 - \$5,000,000
JT	Union Bank of California	December 2001	Mortgage on 723 Mule Ears Court, Norden, CA	\$500,001 - \$1,000,000
SP	Union Bank of California	December 2007	Mortgage on 45 Belden Place, San Francisco, CA	\$1,000,001 - \$5,000,000
SP	Berkadia Commerical Mortgage	August 2007	Mortgage on 25 Point Lobos Avenue, San Francisco, CA	\$1,000,001 - \$5,000,000
JT	Union Bank of California	April 2005	Mortgage on 1600 Atlas Peak Road, Napa, CA	\$250,001 - \$500,000
SP	Union Bank of California	July 2002	Equity Line of Credit on 11 Zinfandel Lane, St. Helena, CA	\$1,000,001 - \$5,000,000
SP	City National Bank	July 2011	Brokerage Collateral Loan	\$1,000,001 - \$5,000,000
JT	Union Bank of California	September 2007	Mortgage on 2640 Broadway, San Francisco, CA	\$5,000,001 - \$25,000,000
SP	Bank of America	November 2006	Mortgage on 3030 K Street, Washington, DC	\$1,000,001 - \$5,000,000
SP	Bank of America	January 2003	Equity Line of Credit on 3030 K Street, Washington, DC	\$100,001 - \$250,000
JT	Union Bank of California	December 2012	Equity Line of Credit on 2640 Broadway, San Francisco, CA	\$500,001 - \$1,000,000
SP	City National Securities	Ongoing	Brokerage Margin Account	\$1,000,001 - \$5,000,000
JT	City National Bank	April 2014	Equity Line of Credit on 723 Mule Ears Court, Norden, CA	\$100,001 - \$250,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Barclays Bank	October 2014	US Airways MasterCard Revolving Line	\$15,001 - \$50,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
CFO & Secretary	The Paul & Nancy Pelosi Charitable Foundation
Honorary Advisory Board	The Women & Politics Institute at American University
Congressional Advisory Board	International Women's Democracy Center
Trustee	United States Botanic Garden
Board of Trustees Member Ex Officio	Kennedy Center
Honorary Board of Advisors	Lead America
Honorary Board of Advisors	National Student Leadership Foundation
Honorary Member	Wheelchair Foundation
Honorary Board Member	National Women's History Museum
Distinguished Board Member	National Organization of Italian American Women
Board of Advisors	Close Up Foundation
Member of Board of Directors	National First Ladies' Library

**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.

**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. Nancy Pelosi , 07/7/2015