



Filing ID #10006970

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Sander M. Levin  
**Status:** Member  
**State/District:** MI09

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2013  
**Filing Date:** 05/14/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
1/2 interest in 78 acres, Tyrone Township, Michigan LOCATION: Tyrone Township, Livingston County, MI, US		\$150,100	None		<input type="checkbox"/>
1/6 interest in 18 acres, Tyrone Township, Michigan LOCATION: Tyrone Township, Livingston County, MI, US		\$13,600	None		<input type="checkbox"/>
1/9 undivided interst in Levinson-Levin Properties, L.L.C., commercial real estate, West Maple, Birm LOCATION: Birmingham, MI, US		\$66,647	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
1/9 undivided interst in Levinson-Levin Properties, L.L.C., commercial real estate, West Maple, Birm LOCATION: Birmingham, MI, US		\$124,162	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
5.3% interest in Michigan mineral rights previously held by LNS Co., a general partnership now liqui DESCRIPTION: 5.3% interest in Michigan mineral rights previously held by LNS Co., a general partnership now liquidated: Muskegon Development Co., an assignee from previous lease - income - \$74; Breitburn Operating LP - income - \$989.28; Merit Energy Co. - income - \$2,789.92; Linn Operating Inc., - income - \$2,821.50. The year-end value of these interests are estimated herein based on latest available information and technical advice.		\$15,001 - \$50,000	Royalties	\$6,674.7	<input type="checkbox"/>
Apple Bank for Savings	SP	\$43,227	Interest	\$104	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Congressional Federal Credit Union		\$22,162	None		<input type="checkbox"/>
Emigrant Bank	SP	\$55,052	Interest	\$42	<input type="checkbox"/>
House, Lot 4, West Tisbury, Mass. (subject to Quicken Loan mortgage)		\$1,171,300	Rent	\$18,701	<input type="checkbox"/>
LOCATION: West Tisbury, MA, US					
IRA: First National Bank Certificate of Deposit	SP	\$13,496	Tax-Deferred	None	<input type="checkbox"/>
IRA: First National Bank Certificate of Deposit	SP	\$7,624	Tax-Deferred	None	<input type="checkbox"/>
IRRA: American Bond Fund of America CL C		\$1,438.39	Tax-Deferred		<input checked="" type="checkbox"/>
COMMENTS: \$17,636 was incorrect. \$1,438.39 was the amount that should have been reported on this asset.					
IRRA: American Capital Income Builder CL C		\$19,206	Tax-Deferred	None	<input type="checkbox"/>
IRRA: American Capital Income Builder CL F1		\$17,631.75	Tax-Deferred		<input type="checkbox"/>
COMMENTS: This asset was inadvertently omitted after the item above, American Capital Income Builder CL C, was split into two parts.					
IRRA: American Income Fund of America CL C		\$56,895	Tax-Deferred	None	<input type="checkbox"/>
Penn State Federal Credit Union	SP	\$68,388	Interest	\$13	<input type="checkbox"/>
Penn State Univ. Alternate Retirement Plan: CREF Social Choice	SP	\$166,214	Tax-Deferred	None	<input type="checkbox"/>
Penn State Univ. Alternate Retirement Plan: TIAA Traditional	SP	\$191,435	Tax-Deferred	None	<input type="checkbox"/>
Penn State Univ. Alternate Retirement Plan: CREF Global Equities	SP	\$162,831	Tax-Deferred	None	<input type="checkbox"/>
Penn State Univ. Tax Deferred Annuity Plan: TIAA Traditional	SP	\$45,824	Tax-Deferred	None	<input type="checkbox"/>
Penn State Univ. Tax Deferred Annuity Plan: CREF Global Equities	SP	\$92,484	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Penn State Univ. Tax Deferred Annuity Plan: CREF Growth	SP	\$38,818	Tax-Deferred	None	<input type="checkbox"/>
Penn State Univ. Tax Deferred Annuity Plan: CREF Social Choice	SP	\$289	Tax-Deferred	None	<input type="checkbox"/>
Security Benefit: Variflex Qualified Variable Annuity	SP	\$43,579	Tax-Deferred	None	<input type="checkbox"/>
The Victoria S. Levin Special Legacy Trust: American Capital Income Builder CL C		\$129,639	Capital Gains, Dividends	\$6,523	<input checked="" type="checkbox"/>
The Victoria S. Levin Special Legacy Trust: American Bond Fund of America CL C		\$107,459	Dividends	\$1,806	<input checked="" type="checkbox"/>
The Victoria S. Levin Special Legacy Trust: American Income Fund of America CL		\$136,489	Capital Gains, Dividends	\$6,266	<input checked="" type="checkbox"/>
Univ. of Houston Texas Optional Retirement Program: TIAA Traditional	SP	\$111,106	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo Bank		\$7,996	None		<input type="checkbox"/>

## SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRAA: American Capital Income Builder CLF1		01/11/2013	E	\$	
COMMENTS: This exchange was not reported because there was an even exchange of 290 shares of American Capital Income Builder CL C to CL F1; no money involved.					
IRRA: American Bond Fund of America CL C		01/7/2013	S (partial)	\$25,030.01	<input type="checkbox"/>
The Victoria S. Levin Special Legacy Trust: American Capital Income Builder CL C		09/4/2013	S (partial)	\$13,302.68	<input checked="" type="checkbox"/>
The Victoria S. Levin Special Legacy Trust; American Bond Fund of America CL C		09/4/2013	S (partial)	\$13,329.6	<input type="checkbox"/>
The Victoria S. Levin Special Legacy Trust; American Income Fund of America CL		09/4/2013	S (partial)	\$13,329.65	<input checked="" type="checkbox"/>

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Penn State University	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Quicken Loans	September 2012	Mortgage, West Tisbury, Mass.	\$405,802

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Levinson-Levin Properties, L.L.C.

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

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. Sander M. Levin , 05/14/2015