



Filing ID #10021667

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Tom McClintock
Status: Member
State/District: CA04

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2017
Filing Date: 05/10/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of New York Mellon Corporation (BK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
California Legislators' Retirement System [PE]		Undetermined	Pension Payment	\$5,001 - \$15,000	<input type="checkbox"/>
California Public Employees' Retirement System [PE]		Undetermined	Pension Payment	\$2,501 - \$5,000	<input type="checkbox"/>
Oppenheimer Funds Symbol OAAAX, Portfolio Solutions [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Security Benefits Investment Mix/Fidelity Adv Value Strategies [MF]	SP	None	Capital Gains, Principal	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Liquidation of Retirement Plan					
Security Benefits Investments/Guggenheim World Equity Income [MF]	SP	None	Capital Gains, Principal	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Liquidation of retirement plan					
Wells Fargo Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Security Benefit Investments/Guggenheim World Equity Income [MF]	SP	02/28/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Security Benefits Investment Mix/Fidelity Adv Value Strategies [MF]	SP	02/28/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

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SCHEDULE C: EARNED INCOME

Source	Type	Amount
Petru and Associates, Ltd.	Spouse professional fees	\$5,637.50
California Legislator's Retirement System	Pension	\$6,617.08
California Public Employees Retirement System	Pension	\$3,644.88

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Home Mortgage	December, 2004	Mortgage on personal residence	\$250,001 - \$500,000
JT	U.S. Department of Education	2010 - 2012	Parent-Plus Loans	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2008	State of California	Pension annuity for service in CA State Legislature

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. Tom McClintock , 05/10/2018