L	Yes 🗌 No 🗸	nt child ກ	income, transactions, or liabilities of a spouse or dependent child "yes" unless you have first consulted with the Committee on	sets, "unearned" Do not answer	Exemptions Have you excluded from this report any other assets, "unearned" income, transactions, o because they meet all three tests for exemption? Do not answer "yes" unless you have fine the standards of Official Conduct.	
<u> </u>	Yes No	xcepted	nittee on Standards of Official Conduct and certain other "excepted rt details of such a trust benefiting you, your spouse, or dependent	ved by the Commed from this report	Trusts- Details regarding "Qualified Blind Trusts" approved by the Committee on Standards of Of trusts" need not be disclosed. Have you excluded from this report details of such a trust child?	! 
	SN	JESTIO	MATION ANSWER EACH OF THESE QL	IST INFORM	EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION ANSWER EACH OF THESE QUESTIONS	Ĕ
		se.	schedule attached for each "Yes" response		If yes, complete and attach Schedule V.	<u> </u>
	the appropriate	red and t	Each question in this part must be answered and the appropriate	Yes No V	Did you, your spouse, or a dependent child have any reportable liability (more V. than \$10,000) during the reporting period?	·<
<u> </u>	       	  - 	If yes, complete and attach Schedule IX.	!     	if yes, complete and attach Schedule IV.	
	Yes 🗸 No 🗌	h an outside	Did you have any reportable agreement or arrangement with an outside IX. entity?	Yes 🗸 No 🗌	Did you, your spouse, or dependent child purchase, sell, or exchange any IV. reportable asset in a transaction exceeding \$1,000 during the reporting period?	
			If yes, complete and attach Schedule VIII.	. ₫	i I	İ
	Yes	of filing in th	Did you hold any reportable positions on or before the date of filing in the VIII. current calendar year?	Yes J No	Did you, your spouse, or a dependent child receive "unearned" income of lll. more than \$200 in the reporting period or hold any reportable asset worth	
<u>.</u>			If yes, complete and attach Schedule VII.	\   	If yes, complete and attach Schedule II.	
	or > Yes ☐ No 🗸	ortable travel are than \$335	 ¥.	Yes No 🗸	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?	=
_			If yes, complete and attach Schedule VI.		If yes, complete and attach Schedule I.	
	Yes No	ortable gift in ot otherwise	Did you, your spouse, or a dependent child receive any reportable gift in VI. the reporting period (i.e., aggregating more than \$335 and not otherwise exempt)?	Yes 🗸 No	Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 l. or more from any source in the reporting period?	
			QUESTIONS	OF THESE	PRELIMINARY INFORMATION ANSWER EACH	PR
	•	late.	ation		Type ( Annual (May 15) Amendment	
	more than 30 days	more	Termination Date:	- j	Report	ا مح
	A \$200 penalty shall be assessed against	A \$2	Officer Or Employing Office: Employee		Filer Member of the U.S. State: WI House of Representatives District: 8	s _
	us (Affice Use Only)	u.s. f	(Daytime Telephone)		(Full Name)	
32 MJ	2009 MAY -5 AH 11: 32 M	200	(202)225-5665	   	Representative Steven L. Kagen	i
	alo: Albe resource center	- :: 81 6				-
	N ATIVE PERSONAL A		For use by Members, officers, and employees	MENT	CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT	CA
į			FORM A	TATIVES	UNITED STATES HOUSE OF REPRESENTATIVES	Ş
	HANDRING.			3		

SCHEDULE I - EARNED INCOME	Name Rep. Steven L Kagen	Page 2 of 9
List the source, type, and amount of earned income from any source more during the preceding calendar year. For a spouse, list the sou exceeding \$1,000.	List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totalling \$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.	00 or come
Source	Туре	Amount
Kagen Allergy Clinics, Appleton, WI	Gross revenue from medical services rendered prior to House employment	\$ 802
Transition in the state of the		

<u> </u>	J C S		
	asset or income source is that of your spouse come source is that of your spouse come source is that of your spouse comes or dependent child (DC) or is jointly held (JT), in the optional column on the far left.	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.	BLOCK A  Asset and/or Income Source  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 asset or source of income which generated more than \$200 in "uneamed" income during the year. For rental property or land, provide an address. Provide full names of any mutual funds. For a self-directed IRA (i.e., one where you have the account that exceeds the reporting threshold, and the income earned for the account. For an IRA or retirement plan that is not self-directed, name the institution holding the account and provide its value at the end of the reporting period. For an active business that is not gubilicly traded, in Block A state the nature of the business and its geographic location. For additional information, see the instruction booklet for the reporting year.
None	>		
\$1-\$1,000	œ		_   d
\$1,001-\$15,000	C		nclu pee
\$15,001-\$50,000	0		at c voice as e if an ided
\$50,001-\$100,000	ш		he v
\$100,001-\$250,000	cn:		BLOCK B  Value of Asset  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 generated income, the value should be "None."
\$250,001-500,000	G		BLOCK Be of A e of A valuation fair man at was so because should be shown as the shown and the shown at was so because the shown at which it is shown at the shown at which is shown at the shown at which it is shown at the shown a
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\$25,000,001-\$50,000,000	<u> </u>		ē ē · · · · · · · · · · · · · · · · · ·
Over \$50,000,000			m
DIVIDENDS			ğ - Ω
RENT			heck eav
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CAPITAL GAIN			BLO BLO Saler
ORIGINAL ISSUE DISCOUNT	•		BLOCK C Type of Income all columns than blank if asset of the any income te calendar yea
EXCEPTED TRUST			BLOCK C Type of Income Check all columns that apply Leave blank if asset did not generate any income during the calendar year.
QUALIFIED BLIND TRUST			r. durir
Other Type of Income (Specify)			
None	-		Z
\$1-\$200	*		Name For do inversion the Divi
\$201-\$1,000	≡		retir not the cate the not
\$1,001-\$2,500	₹		Rep.  To no.
\$2,501-\$5,000	<		BLOCK D  Amount of Income  For retirement plans or accounts do not allow you to choose specinvestments, you may write "NA income. For all other assets, ind the category of income by check the appropriate box below. Dividends, even if reinvested, she listed as income was received.
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\$15,001-50,000			n L  (C)  In I  I in I
\$50,001-\$100,000	VII VIII		CO  CO  CO  Sets
\$100,001-\$1,000,000	×		BLOCKD  Amount of Income  For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, indicate the category of income by checking the appropriate box below.  Dividends, even if reinvested, should be listed as income. Check "None" if no income was received.
\$1,000,001-\$5,000,000	×		that ciffic control icate that could ne" if
Over \$5,000,000	×		7 0
	P, S, E		Page 3 of 9  BLOCKE  Transaction  Indicate if asset was purchased (P), sold (S), or exchanged (E) in reporting year.
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Name

Rep. Steven L Kagen

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Govt Natt Mtg Assn, 12%, due 3/15/15 Greater Clark Cnty Sch Bldg Corp Ind Je Green Bay WI GO Corp Purp BdsAA2, o Green Bay WI Met Swr Dist GO Sew Syn Greensburg IN Sch Bldg, 4%, 7/15/14, d Greenwood In Sch Bldg, 4%, 7/15/19, du Greenwood In Sch Bldg, 4%, 7/15/19, du Greenwood In Sch Bldg, 4%, 7/15/19, du Hanover Multi School, 4%, due 7/15/19 DC Home Depot Inc.  JP Morgan Chase Bank Accounts, Apple Kane Cnty II Cmnty Go Bonds, 4%, due 12/31/15 Lawrenceburg IN Sch Bldg, 4.125%, due Madison WI Met Sch Go Bonds, 4%, due 5/01/21 Mankato MN Go Bonds, 4%, due 2/01/19 Marion Cnty IN Convtn Bonds, 4%, due 2/01/19 Marion Cnty IN Convtn Bonds, 5%, due Marysville OH Wastewater, 4%, due 12/0 Mc Henry Cnty I Cmnty Go HSD Apprec Menomonee Falls WI Go Bond, 4%, due 8/01 Miliwaukee WI Redev Auth Bonds, 4.125 Miliwaukee WI Redev Auth Bonds, 4.125 Miliwaukee WI Redev Auth, 4%, due 8/01 Milwaukee WI Redev Rev, 3%, due 8/01/01 Mounds View MN Go Isd, 5%, due 2/01/11	SCHEDULE 111 - ASSETS AND "UNEAF	RNED" INCON	RNED" INCON	NED" INCOME	NED" INCOME	NED" INCOME	NED" INCOME	RNED" INCON	NED" INCOME	NED" INCOME	NED" INCOME	NED" INCOME  BLOCK B  Value of Asset	NED" INCOME  BLOCK B  Value of Asset	NED" INCOME  BLOCK B  Value of Asset	NED" INCOME  BLOCK B  Value of Asset	NED" INCOME  BLOCK B  BLOCK C  Value of Asset  Type	NED" INCOME  BLOCK B  Value of Asset	NED" INCOME  BLOCK B  BLOCK C  Value of Asset  Type	NED" INCOME  BLOCK B  BLOCK C  Value of Asset  Type	NED" INCOME  BLOCK B  Value of Asset  Type  At Classification (Control of Income)	NED" INCOME  BLOCK B  Value of Asset  Type  At Classification (Control of Income)	NED" INCOME  BLOCK B  BLOCK C  Value of Asset  Type	NED" INCOME  BLOCK B  BLOCK C  Value of Asset  Type	NED" INCOME  BLOCK B  BLOCK C  BLOCK D  Amount of Income	NED" INCOME  BLOCK B  BLOCK C  BLOCK D  Amount of Income	NED" INCOME  BLOCK B  BLOCK C  BLOCK D  Value of Asset  Type  Amount of Income	NED" INCOME  BLOCK B  BLOCK C  BLOCK D  BLOCK D  Amount of Income
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15     12   12   1	Mandan ND Go Bonds, 4%, due 5/01/21	↓_			×																X	X	X	X	X	X	X
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Microsoft Corporation Stock  Milwaukee Cnty WI, 3.9%, due 8/01/17  Milwaukee WI Redev Auth Bonds, 4.125%, due Milwaukee WI Redev Auth, 4%, due 8/01/23  Milwaukee WI Redev Rev, 3%, due 8/01/10  Mounds View MN Go Isd, 5%, due 2/01/08	Menomonee Falls WI Go Bond, 4%, due 5/01/16					×	×	×	× × × × × × × × × × × × × × × × × × ×	X	×	**	X							×	X	X	X	X	X	X	X
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1 1 1 1	Milwaukee WI Redev Auth Bonds, 4.125%, due 8/01/18					×	×	×	×	**	***	**								X	X	X	X	X	X	X	X
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Mounds View MN Go Isd, 5%, due 2/01/08	Milwaukee WI Redev Rev, 3%, due 8/01/10	_				*	×	×	×	***	***	***	×							×	×	×	×	×	×	×	×
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Name

Rep. Steven L Kagen

Page 6

of 9

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Will Cnty IL Cmnty USD Bonds, 0%, due 11/01/18	Will & Kendall Cntys Go Bonds, 4.250%, due 01/01/23	Wayne Twp IN Marion Rev Bonds, 2.350%, due 7/15/08	Waupun WI Sch Dist Go Bonds, 4.750%, due 4/01/18	Waterville, MN Go Bonds, 4%, due 12/01/13	Warsaw IN Multi-Sch Bldg Bonds, 4%, due 7/15/19	Valparaiso IN Sewer Rev Bonds, 4.5%, due 8/01/24	US Treasury Bond Sec, 0%, due 8/15/18	US Treasury Bond Sec, 0%, due 5/15/20	US Tr		US Tr	Tri-Creek 2002 High Bonds, 4.250%, due 01/15/23	Tamarack Tax Free Money Market	Streettracks Gold Trust ETF	St. Francis MN Isd Go Bonds, 4%, due 2/01/21	St Paul MN Cap Improvement Go Bonds, 4.125%, due	St Joseph Cnty IN Econ Bonds, 4.250%, due 4/01/24	Southeast WI Pro Baseball Bonds, 0%, due 12/15/13	Series HH/H US Savings Bonds	Puerto Rico Indl Med Rv Bonds, 5.1%, due 12/01/18	Puerto Rico Commonwealth Go Bonds, 4.875%, due 7/01/23	Pine Grove PA Area Sch Dist GO School Bds Series AA3, due 09/01/13	Osakis MN Isd #213 Go Bonds, 4%, due 02/01/17	Orono MN Hsg & Redev Bonds, 3.2%, due 2/01/15	Oregon WI Sch dist Go Bonds, 4%, due 4/01/13	Olmsted Cnty MN Go, 4.125%, due 02/01/24	Novi Mich Cmnty Sch Go, 4%, due 5/01/20	North Dakota St Bldg Bonds, 4%, due 12/01/18	New York NY Go Bonds, 3.625%, due 8/01/10				
nty IL	Kenc	e Tw	un W	≦ e	Z	raiso	easu	easur	Treasury Bond Sec, 0%, due 2/15/19	easu	Treasury Bond Sec, 0%, due 11/15/16	eek 2	I G	track	ancis	L N	eph (	east '	/HH §	Rick	Ric	Grove	s MN	Ž	on ≤	led C	Mich	Dako	l S S				ĺ
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Wisconsin St GO Refunding MBIA B/E Unitd tax	Wisconsin St GO Bonds, due 5/01/17	Wisconsin St Go Bonds, due 5/01/08	Wisconsin St Bonds, due 5/01/13				Asset and/or Income Source	BLOCK A	SCIICDOLE 111 - ASSETS AND ONEARNED INCOME
×	X	X		None \$1-\$1,000 \$1,001-\$15,000 \$15,001-\$15,000 \$50,001-\$100,000 \$250,001-\$250,000 \$250,001-\$1,000,000 \$1,000,001-\$5,000,000 \$1,000,001-\$5,000,000 \$25,000,001-\$5,000,000 \$25,000,001-\$50,000,000	A B C D E F G H - L X E	at close of reporting year.	Value of Asset	BLOCK B	
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S		S		Over \$5,000,000	(I P, S, E	action	Trans-	BLOCK E	OT 9

SP, DC your personal residence, unless it is rented out. amount of the transaction exceeded \$1,000. Include transactions stocks, bonds, commodities futures, or other securities when the dependent child during the reporting year of any real property, Report any purchase, sale, or exchange by you, your spouse, or your spouse, or your dependent child, or the purchase or sale of that resulted in a loss. Do not report a transaction between you, SCHEDULE 1V - TRANSACTIONS Wisconsin St Go Bonds, due 5/01/08 Puerto Rico Commonwealth Go Bonds, 4.875%, due 7/01/23 Fond Du Lac WI GO FGIC Prom nts ut b/e Mounds View MN Go Isd, 5%, due 2/01/08 Kane Cnty IL Sch Dist Go Bonds, 0%, due 6/01/08 Elkhart IN Cmnty Schs Bonds, 2.5%, due 08/15/08 Eau Claire WI Waterworks, 3%, due 10/01/08 Cook & Du Page Cntys Go, 0%, due 12/01/08 Streettracks Gold Trust ETF Pine Grove PA Area Sch Dist GO School Bds Series AA3, Green Bay WI GO Corp Purp BdsAA2, due 04/01/18 Greater Clark Cnty Sch Bldg Corp Ind Jeffersonville NR, due 07/15/18 Appleton WI Area Sch Dist Ref Go Bds 2005, due 03/01/15 Wisconsin St GO Refunding MBIA B/E Unitd Tax Wayne Twp IN Marion Rev Bonds, 2.350%, due 7/15/08 Ela Area IL Pub Library Go Bonds, 2.625%, due 12/30/08 Green Bay WI Met Swr Dist GO Sew Sys, due 05/01/18 Asset due 09/01/13  $\times | \times$ ×× PURCHASE SALE EXCHANGE (MO/DAY/YR) Name 05/01/08 06/17/08 07/15/08 07/01/08 02/01/08 06/02/08 08/15/08 03/17/08 08/04/08 08/27/08 08/04/08 08/26/08 01/07/08 10/01/08 12/01/08 10/14/08 12/30/08 Date Rep. Steven L Kagen W \$1,001-\$15,000 റ \$15,001-\$50,000 **Amount of Transaction** O \$50,001-\$100,000 Ш \$100,001-\$250,000 77 \$250,001-\$500,000 G \$500,001-\$1,000,000 I Page 8 of 9 \$1,000,001-\$5,000,000 \$5,000,001-\$25,000,000 \$25,000,001-\$50,000,000 Over \$50,000,000

## Name Rep Steven L Kagen

**SCHEDULE IX - AGREEMENTS** 

Page 9 of 9

employee welfare or benefit plan maintained by a former employer. government service; continuation or deferral of payments by a former or current employer other than the U.S. Government; or continuing participation in an Identify the date, parties to, and general terms of any agreement or arrangement with respect to: future employment; a leave of absence during the period of

		January 2, 2007	
		Steven L Kagen & Kagen Allergy Clinic, S.C.	
Steven L Kagen received pass-through payments of accounts receivable for services rendered prior to becoming a member of the U.S. Congress.	medical malpractice insurance coverage and (b) any ordinary overhead - related expenses for his service to Kagen Allergy Clinic, S.C. patients. Steven L. Kagen did not work for Kagen Allergy Clinic, S.C. in 2008.	Steven L Kagen, M.D. may be employed by the Kagen Allergy Clinic, S.C.	