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		boure hereof,	Financial Disclosure Statement & Spoure in attaches hered and mude a partherest,
	hild thics. Yes 🗆 No 🐼	ome, transactions, or liabilities of a spouse or dependent c s" unless you have first consulted with the Committee on E	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 Ethics.
	Yes 🗆 No 🕙	e on Ethics and certain other "excepted trusts" need not be t benefiting you, your spouse, or dependent child?	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?
	STIONS	TION ANSWER EACH OF THESE QUESTIONS	EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION ANSWER
	and the appropriate		V. than \$10,000) during the reporting period?  Yes No William \$10,000 during the reporting period?
		If yea, complete and attach Schedule IX.	If yes, complete and attach Schedule IV.
	Yes No	Did you have any reportable agreement or arrangement with an outside IX. entity?	hase, sell, or exchange any yes No 2
		If yes, complete and attach Schedule VIII.	If yes, complete and attach Schedule III.
	Yes V No	Did you hold any reportable positions on or before the date of filing in the VIII. current calendar year?	Did you, your spouse, or a dependent child receive "uneamed" income of III. more than \$200 in the reporting period or hold any reportable asset worth Yes W No III more than \$1.000 at the end of the period?
	nen 5336 Yes 🖂 No 🕢	Vil. reimbursements for travel in the reporting period (worth more than \$335 from one source)? If yes, complete and attach Schedule VII.	Yes No
	la trauai or	If yes, complete and attach Schedule VI.	If yea, complete and attach Schedule I.
	theretae Yes No V	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)?	Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 Yes 🕢 No 📋
		UESTIONS	PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS
	more than 30 days late.	Termination Date: on	Report ( Annual (May 15) Amendment
	A \$200 penalty shall be assessed against anyone who files	Officer Or Employing Office: Employee	Filer Member of the U.S. State: CA Status House of Representatives District: 41
	OUS A OFFICE USE DRAY//LS	(Daytime Telephone) נו S.	(Full Name)
Z	2011 MAY -9 AM 11: 25	(202)225-5861	Jerry Lewis
	ATTY OF PERSONNE OF MIN.	FORM A  For use by Members, officers, and employees	UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2010 FINANCIAL DISCLOSURE STATEMENT
-	NU しだし1 V じれた		

# SCHEDULE I - EARNED INCOME

Name Jerry Lewis

Page 2 of 6

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	Туре	Amount
Legislators Retirement System, State of CA.	Legislative Pension	\$4,471.56
Penn Mutual Life Insurance Agents (handled by MG Trust Compa, LLC	Agents Retirement	\$5,766.13

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Exclude: Your personal residence, including second homes and publically traded, state the name of the business, the nature of its vacation homes (unless there was rental income during the reporting activities, and its geographic location in Block A. For an ownership interest in a privately-held business that is not For rental or other real property held for investment, provide a complete of the institution holding the account and its value at the end of the retirement accounts which are not self-directed, provide only the name asset held in the account that exceeds the reporting thresholds. For exercised, to select the specific investments), provide the value for each self-directed (i.e., plans in which you have the power, even if not For all IRAs and other retirement plans (such as 401(k) plans) that are Provide complete names of stocks and mutual funds (do not use ticker and (b) any other reportable asset or sources of income which a fair market value exceeding \$1,000 at the end of the reporting period, Identify (a) each asset held for investment or production of income with reporting period. symbols.) generated more than \$200 in "unearned" income during the year. Asset and/or Income Source Copy attached Chas. Schwab Money Mkt. IRA Chas. Schwab IRA distribution Lewis Family Trust 1/4 Sh Legislators Retirement System Congressional Federal Credit Arrowhead Credit Union **BLOCK A** m \$50,000 \$15,001 -\$250,000 \$100,001 -\$250,000 \$100,001 -\$100,000 \$50,001 -\$100,000 \$50,001 -\$250,000 than fair market value, \$100,001 the value should be it is generated income valuation method other included only because asset was sold and is method used. If an please specify the year. If you use a at close of reporting Value of Asset Year-End BLOCK B Name Jerry Lewis Distrbutioni Distribution Distribution check the "None" plans or IRAs), you may Check all columns that INTEREST period. during the reporting generated no income Check "None" if the asset even if reinvested, must column. Dividends, generate tax-deferred investments or that NTEREST NTEREST be disclosed as income. interest, and capital gains, income (such as 401(k) you to choose specific accounts that do not allow apply. For retirement Type of Income BLOCK C NONE \$1,001 - \$2,500 \$2,501 - \$5,000 \$201 - \$1,000 \$2,501 - \$5,000 earned or generated. \$201 - \$1,000 "None" if no income was disclosed as income. Check reinvested, must be capital gains, even if appropriate box below. of Income by checking the do not allow you to choose Dividends, interest, and assets, indicate the category (such as 401(k) plans or generate tax-deferred income specific investments or that 'None" column. For all other For retirement accounts that RAs), you may check the Amount of income BLOCKD exchanges (E) reporting year. Transaction \$1,000 in exceeding Indicate if asset (P), sales (S), or had purchases BLOCK E Page 3 of 6

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME Name Jerry Lewis

Security Bank of CA-2200 Shares Security Bank of CA-Certificate of Deposit retirement Penn Mutual Life Insurance Co. \$100,001 -\$250,000 \$15,001 -\$50,000 \$100,001 -\$250,000 None Distribution INTEREST NONE \$201 - \$1,000 \$5,001 - \$15,000 Page 4 of 6

#### **SCHEDULE VIII - POSITIONS**

Name Jerry Lewis

Page 5 of 6

Report all positions, compensated or uncompensated, held during the current calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or any business enterprise, any nonprofit organization, any labor organization, or any educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities; positions solely of an honorary nature; and positions listed on Schedule I.

Position	Name of Organization
1959 Penn Mutual Life Insurance Co.	Agents Retirement Plan (now administered by MG Trust Co. LLC)
1969 Legislatire Retirement System	State of CA.

### **SCHEDULE IX - AGREEMENTS**

Name Jerry Lewis

Page 6 of 6

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 government service; continuation or deferral of payments by a former or current employer other than the U.S. Government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

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Date	Parties To	Terms of Agreement
1959	Penn Mutual Life Insurance Co. (now administered by MG Trust Company, LLC	Agents Retirement Plan
1969	Legislative Retirement System	State of CA

The undersigned, Richard J. Lewis, Edward R. Lewis, Jr., C. Jeremy Lewis, and John C. Lewis are the vested sole beneficiaries of the Edward R. Lewis and Elaine L. Lewis Trust executed June 15, 1983, a copy of which is attached hereto. Following the deaths of Edward R. Lewis and Elaine L. Lewis, outright distribution has been made of some of the assets of this Trust, but the assets listed on Schedule A attached hereto continue to be held by C. Jeremy Lewis as Trustee of said Trust for the benefit of all of the undersigned.

The undersigned hereby agree that said property shall continue to be held, administered, and distributed by Trustee of said Trust in accordance with the provisions of said Trust as modified by this instrument.

- 1. <u>Purpose</u>. The purpose of this Trust as hereby extended shall be for Trustee to manage the assets of this Trust, collect all payments on obligations owed, divide and distribute the proceeds equally between us, liquidate all tangible assets of this Trust, and make distribution of the net proceeds to us.
- 2. Term. The term of this Trust shall be for so long as necessary to sell the real property and obtain complete payment on all notes and contracts which are the subject of this Trust, or for 10 years from the date of this instrument, whichever first occurs. At the expiration of this Trust, outright distribution shall be made by Trustee to the undersigned in equal shares, if all of them living, or to the successor beneficiaries of each of us as designated on the beneficiary designation of each, if any of us is not living at the time a distribution is to be made.
- Beneficiary Designations. For so long as each of us are living, all distributions shall be made in equal shares to each of us, with Trustee holding such reserves as Trustee may deem appropriate for the management of the Trust estate. Upon the death of any of us prior to the termination of this Trust, the share of this Trust allocable to such deceased person and all distributions being made for such person shall be delivered to the beneficiaries designated for such person in accordance with the Beneficiary Designation of such deceased person delivered to Trustee. If no Beneficiary Designation has been executed by any of us at the time of the death of any of us or Trustee has not received the original of such Beneficiary Designation when a distribution is to be made, distribution of such deceased person's share shall be made without the need for any probate administration to the beneficiaries of such deceased person's last Will, or if there is no Will, to such deceased beneficiary's intestate heirs according to California': laws of intestate succession. If Trustee has any doubt as to the appropriate distribution to be made, Trustee may, in Trustee's sol! discretion, make distribution to the estate of the one of us as to

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when the ambiguity exists or may polition the Court for instructions as to the appropriate distribution. Each of us may modify his Beneficiary Designation at any time by sending to Trustee a duly executed revision and, upon receipt of such change of Eeneficiary Designation by Trustee, such change shall be effective.

- 3.1 Each of us shall be considered as the primary beneficiary of his share of this Trust, and the designated successor teneficiaries shall have no rights or powers concerning this Trust until the interests of such successor teneficiaries vest upon the death of one of us.
- 3.2 Notwithstanding anything set forth above, Trustee may, in Trustee's sole discretion, at any time elect to distribute all of the assets of this Trust in undivided shares equally between the four primary beneficiaries of the Trust; provided, however, if any of us is then deceased, the distribution of the share of such deceased one of us shall be made to the designated beneficiaries of such deceased person.
- 4. Additional modifications of Trust. This Trust may be amended at any time by written document executed by the four of us and may be revoked by written document executed by the four of us. It may not be amended or revoked in any other manner.

Richard J. Lewis.

Edward R. Lewis, Jr.

C. Jeremy Cewis

John C. Lewis

Approved as to form:
GRESHAM, PARKER, SAVAGE, NOLAN & TILDEN

Philip Misarage, 111

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All assets of the Edward R. and Elaine Lewis Trust dated June 15, 1983 remaining Following outright distributions after the death of Edward R. Lewis on May 13, 1988, Including but not limited to the following as of December 31,

Lot 32 Area 43,608 sq. ft. in Block 265 as delineated on the map entitled Hawaiian Ocean View Estates which said map was filed in the Bureau of Conveyances of the State of Hawaii 4-5-62 as File Plan 787.

Real property in San Bernardino County, a., subject to contract for sale dated November 5, 1999 for \$39,000 by David T. Kupfer.

Real property in San Bernardino County, Ca., subject to contract for sale dated 3, 1997, for \$30,000 by Robert and Betty Lou Haisch.

Real property in San Bernardino County, Ca., subject to contract for sale dated February 22, 2005, for \$40,000 by Helena Bongartz. - Stent Deed 15546 12/20/10 Real property in San Bernardino County, Ca. subject to contract for sale dated February 22, 2005, for \$30,000 by Helena Bongartz. - Grent Deed 15546 12/20/10 Real property in San Bernardino County, Ca. subject to contract for sale dated February 1, 2005, for \$24,000 by Cliff and Toni McDonald.

Real property in San Bernardino County, Ca. subject to contract for sale dated May 1, 2000 for \$32,000 by Timothy and Florance Haisch.

CALENDAR YEAR 2010 FINANCIAL DISCLOSURE STATEMENT  After M. Willis  Filer  Status  After M. Willis  After M.
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# SCHEDULE I - EARNED INCOME

Name Arlene M. Willis

Page 2 of 4

List the source, type, and amount of samed 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	Туре	Amount
Legislators Retirement System, State of CA. (Spouse)	Legislative Pension (Spouse)	\$4,471.56
Penn Mutual Life Insurance Agents (handled by MG Trust Company, LLC. (Spouse)	Agents Retirement (Spouse)	\$5,766.13

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vacation homes (unless there was rental income during the reporting publically traded, state the name of the business, the nature of its Exclude: Your personal residence, including second homes and activities, and its geographic location in Block A. For an ownership interest in a privately-held business that is not For rental or other real property held for investment, provide a complete of the institution holding the account and its value at the end of the asset held in the account that exceeds the reporting thresholds. For exercised, to select the specific investments), provide the value for each self-directed (i.e., plans in which you have the power, even if not For all IRAs and other retirement plans (such as 401(k) plans) that are generated more than \$200 in "unearned" income during the year and (b) any other reportable asset or sources of income which a fair market value exceeding \$1,000 at the end of the reporting period, reporting period. retirement accounts which are not self-directed, provide only the name symbols.) Provide complete names of stocks and mutual funds (do not use ticker Identify (a) each asset held for investment or production of income with iddress. Asset and/or Income Source Union REPORT SHOWN ON SPOUSE EACH ITEM SAME AS THOSE Congressional Federal Credit Chas. Schwab Money Mkt. IRA Chas. Schwab IRA Distribution Arrowhead Credit Union Legislators Retirement System BLOCK A 而 \$100,001 -\$250,000 \$250,000 \$100,001 -\$100,000 \$100,000 \$250,000 \$100,001 -\$50,001 -\$50,001 than fair market value, the value should be it is generated income included only because asset was sold and is method used. If an please specify the at close of reporting valuation method other year. If you use a Value of Asset Year-End BLOCK B Name Arlene M. Willis ١ Distribution during the reporting be disclosed as income. even if reinvested, must interest, and capital gains plans or iRAs), you may Distribution generated no income Check "None" if the asser column. Dividends, check the "None" Check all columns that NTEREST NTEREST NTEREST income (such as 401(k) generate tax-deferred investments or that you to choose specific accounts that do not allow apply. For retirement Type of Income BLOCK C \$2,501 - \$5,000 1 NONE \$201 - \$1,000 \$2,501 - \$5,000 \$201 - \$1,000 earmed or generated. capital gains, even If Dividends, interest, and of income by checking the assets, indicate the category specific investments or that do not allow you to choose disclosed as income. Check reinvested, must be appropriate box below. "None" column. For all other IRAs), you may check the generate tax-deferred incom For retirement accounts that "None" If no income was such as 401(k) plans or Amount of Income BLOCK D Indicate if asset reporting year. \$1,000 in exceeding exchanges (E) (P), sales (S), or had purchases Transaction BLOCK E Page 3 of 4

SCHEDU	SCHEDULE III - ASSETS AND "UNEARNED" INCOME	Name Arlene M. Willis	Willis		Page 4 of 4
	Lewis Family Trust 1/4 Sh. Copy attached	\$15,001 - \$50,000	Distribution	\$1,001 - \$2,500	
	Penn Mutual Life Insurance Co. Retirement	\$100,001 - \$250,000	Distribution	\$5,001 - \$15,000	
	Security Bank of CA-2200 shs.	\$15,001 - \$50,000	None	NONE	
	Security Bank of CA Certificate of Deposit	\$100,001 - \$250,000	INTEREST	\$201 - \$1,000	

The undersigned, Richard J. Lewis, Edward R. Lewis, Jr., C. Jeremy Lewis, and John C. Lewis are the vested sole beneficiaries of the Edward R. Lewis and Elaine L. Lewis Trust executed June 15, 1983, a copy of which is attached hereto. Following the deaths of Edward R. Lewis and Elaine L. Lewis, outright distribution has been made of some of the assets of this Trust, but the assets listed on Schedule A attached hereto continue to be held by C. Jeremy Lewis as Trustee of said Trust for the benefit of all of the undersigned.

The undersigned hereby agree that said property shall continue to be held, administered, and distributed by Trustee of said Trust in accordance with the provisions of said Trust as modified by this instrument.

- 1. <u>Purpose</u>. The purpose of this Trust as hereby extended shall be for Trustee to manage the assets of this Trust, collect all payments on obligations owed, divide and distribute the proceeds equally between us, liquidate all tangible assets of this Trust, and make distribution of the net proceeds to us.
- 2. Term. The term of this Trust shall be for so long as necessary to sell the real property and obtain complete payment on all notes and contracts which are the subject of this Trust, or for 10 years from the date of this instrument, whichever first occurs. At the expiration of this Trust, outright distribution shall be made by Trustee to the undersigned in equal shares, if all of them living, or to the successor beneficiaries of each of us as designated on the beneficiary designation of each, if any of us is not living at the time a distribution is to be made.
- Beneficiary Designations. For so long as each of us are living, all distributions shall be made in equal shares to each of us, with Trustee holding such reserves as Trustee may deem appropriate for the management of the Trust estate. Upon the death of any of us prior to the termination of this Trust, the share of this Trust allocable to such deceased person and all distributions being made for such person shall be delivered to the beneficiaries designated for such person in accordance with the Beneficiary Designation of such deceased person delivered to Trustee. If no Beneficiary Designation has been executed by any of us at the time of the death of any of us or Trustee has not received the original of such Beneficiary Designation when a distribution is to be made, distribution of such deceased person's share shall be made without the need for any probate administration to the beneficiaries of such deceased person's last Will, or if there is no Will, to such deceased beneficiary's intestate heirs according to California': laws of intestate succession. If Trustee has any doubt as to the appropriate distribution to be made, Trustee may, in Trustee's sole discretion, make distribution to the estate of the one of us as to

when the ambiguity exists or may petition the Court for instructions as to the apprepriate distribution. Each of us may modify his Beneficiary Designation at any time by sending to Trustee a duly executed revision and, upon receipt of such change of Beneficiary Designation by Trustee, such change shall be effective.

- 3.1 Each of us shall be considered as the primary beneficiary of his share of this Trust, and the designated successor beneficiaries shall have no rights or powers concerning this Trust until the interests of such successor beneficiaries vest upon the death of one of us.
- may, in Trustee's sole discretion, at any time elect to distribute all of the assets of this Trust in undivided shares equally between the four primary beneficiaries of the Trust; provided, however, if any of us is then deceased, the distribution of the share of such deceased one of us shall be made to the designated beneficiaries of such deceased person.
- 4. Additional modifications of Trust. This Trust may be amended at any time by written document executed by the four of us and may be revoked by written document executed by the four of us. It may not be amended or revoked in any other manner.

Richard J. Lewis.

Edward R. Lewis.

C. Jeremy Cewis

John G. Lewis

Approved as to form:
GRESHAM, WARNER, SAVAGE, NOLAN & TILDEN

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All assets of the Edward R. and Elaine Lewis Trust dated June 15, 1983 remaining Following outright distributions after the death of Edward R. Lewis on May 13, 1988, Including but not limited to the following as of December 31, 2010

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