



Filing ID #10014480

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Michael G. Fitzpatrick  
**Status:** Former Member  
**State/District:** PA08

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2017  
**Filing Date:** 01/31/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
401(K) ⇒ Abbott Laboratories (ABT)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ Altria Group, Inc. (MO)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ Apple Inc. (AAPL)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ BLACKROCK GLOBAL ALLOCATION FD INSTL (MALOX)		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
401(K) ⇒ Bristol-Myers Squibb Company (BMY)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ CA Inc. (CA)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ CASH ACCOUNT - BIF MONEY FUND		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
DESCRIPTION: CASH ACCOUNT				

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
401(K) ⇒ Colgate-Palmolive Company (CL)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
401(K) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
401(K) ⇒ Eli Lilly and Company (LLY)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
401(K) ⇒ Ford Motor Company (F)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
401(K) ⇒ FRANKLIN STRATEGIC INCOME FUND ADVISOR CLAS (FKSAX)		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
401(K) ⇒ General Electric Company (GE)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
401(K) ⇒ Honeywell International Inc. (HON)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
401(K) ⇒ Intel Corporation (INTC)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
401(K) ⇒ iShares U.S. Real Estate ETF (IYR)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
401(K) ⇒ JANUS FLEXIBLE BOND FD (JFLEX)		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
401(K) ⇒ JP Morgan Chase & Co. (JPM)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
401(K) ⇒ Kimberly-Clark Corporation (KMB)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
401(K) ⇒ LyondellBasell Industries NV Ordinary Shares Class A (LYB)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
401(K) ⇒ MAINSTAY LARGE CAP GROWTH FUND CL I (MLAIX)		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
401(K) ⇒		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Medtronic Inc. (MDT)				
401(K) ⇒ MetLife, Inc. (MET)		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
401(K) ⇒ Occidental Petroleum Corporation (OXY)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ Paychex, Inc. (PAYX)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ Pepsico, Inc. (PEP)		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
401(K) ⇒ Phillips 66 (PSX)		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
401(K) ⇒ SPDR Select Sector Fund - Utilities (XLU)		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
401(K) ⇒ Spectra Energy Corp (SE)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ Starbucks Corporation (SBUX)		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
401(K) ⇒ Texas Instruments Incorporated (TXN)		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
401(K) ⇒ Time Warner Inc. New (TWX)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ United Technologies Corporation (UTX)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ Verizon Communications Inc. (VZ)		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
401(K) ⇒ Wells Fargo & Company (WFC)		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
COUNTY OF BUCKS ⇒ EMPLOYEE RETIREMENT		\$50,001 - \$100,000	Tax-Deferred	None <input type="checkbox"/>
DESCRIPTION: PENSION PLAN				

\* Asset class details available at the bottom of this form.

**SCHEDULE B: TRANSACTIONS**

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
401(K) ⇒ FRANKLIN STRATEGIC INCOME FUND ADVISOR CLASS (FKSAX)		10/5/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

\* Asset class details available at the bottom of this form.

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount
OFFICE OF CATHOLIC EDUCATION, ARCHDIOCESE OF PHILADELPHIA	SPOUSE SALARY	N/A

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	PENN COMMUNITY BANK	Dec 2013	MORTGAGE ON PRIMARY RESIDENCE - LEVITTOWN, PA	\$100,001 - \$250,000
JT	PENN COMMUNITY BANK	OCTOBER 2016	HOME EQUITY LINE OF CREDIT	\$15,001 - \$50,000

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
January 1995	Me and The County of Bucks	Pension Plan available at retirement.

**SCHEDULE G: GIFTS**

None disclosed.

**SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS**

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
REPUBLICAN MAIN STREET PARTNERSHIP	06/2/2016	06/5/2016	NEWARK, NJ - NEW ORLEANS, LA - NEWARK, NJ	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- 401(K)
- COUNTY OF BUCKS

## 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. Michael G. Fitzpatrick , 01/31/2017