

UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

FORM A
For use by Members, officers, and employees

Page 1 of 7

HAND DELIVERED

LEGISLATIVE RESOURCE CENTER

MC

Edward J. Markey

202-225-2836

2009 MAY 15 PM 4:17

(Full Name)

(Daytime Telephone)

(Office Use Only)

Filer Status
☒ Member of the U.S. House of Representative
State: MA District: 07

☐ Officer Or Employee
Employing Office:

Termination Date:

Report Type
☒ Annual (May 15) ☐ Amendment ☐ Termination

A \$200 penalty shall be assessed against anyone who files more than 30 days late.

PRELIMINARY INFORMATION -- ANSWER EACH OF THESE QUESTIONS

I. Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$335 and not otherwise exempt)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule I.		If yes, complete and attach Schedule VI.	
II. 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?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$335 from one source)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule II.		If yes, complete and attach Schedule VII.	
III. Did you, your spouse, or a dependent child receive "unearned" income of more than \$200 in the reporting period or hold any reportable asset worth more than \$1,000 at the end of the period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
If yes, complete and attach Schedule III.		If yes, complete and attach Schedule VIII.	
IV. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule IV.		If yes, complete and attach Schedule IX.	
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.	
If yes, complete and attach Schedule V.			

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION -- ANSWER EACH OF THESE QUESTIONS

Trusts- Details regarding "Qualified Blind Trusts" approved by the Committee on Standards of Official Conduct 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 <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 Standards of Official Conduct.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

SCHEDULE I - EARNED INCOME

Name Edward J. Markey

Page 2 of 7

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	Type	Amount
US Public Health Service, Department of Health and Human Services	Spouse - Pension	N/A
Private Practice of Medicine	Spouse - Medical Fees	N/A
Global Health Institute, LLC	Spouse - Salary	N/A
Allied Jewish Communities of Colorado	Spouse - Lecture Fees	\$10,000
United Jewish Communities	Spouse - Lecture Fees	\$5,000
Center for Strategic and International Studies	Spouse - Book chapter writing fees	\$1,000

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Edward J. Markey

Page 3 of 7

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 assets or sources of income which generated more than \$200 in "unearned" income during the year. For rental property or land, provide a complete address. Provide full names of stocks and mutual funds (do not use ticker symbols). For all IRAs and other retirement plans (such as 401(k) plans) that are self directed (i.e., plans in which you have the power, even if not exercised, to select the specific investments), provide the value and income information on each asset in the account that exceeds the reporting threshold. For retirement plans that are not self-directed, name the institution holding the account and its value at the end of the reporting period. For an active business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. For additional information, see the instruction booklet.

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.

If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC) or is jointly held (JT), in the optional column on the far left.

BLOCK B

Year-End 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 is generated income, the value should be "None."

BLOCK C

Type of Income

Check all columns that apply. For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA". For all other assets including all IRAs, indicate the type of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if asset did not generate any income during the calendar year.

BLOCK D

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, including all IRAs, indicate the category of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if no income was earned or generated.

BLOCK E

Transaction

Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.

JT	Cong. Federal Credit Union Accts	\$15,001 - \$50,000	INTEREST	\$1 - \$200	
	Rydex OTC Investor Class Fund	\$15,001 - \$50,000	None	NONE	
	Janus Global Technology Fund	\$1,001 - \$15,000	None	NONE	
	Salomon Smith Barney, IRA - NASDAQ 100 Trust (QQQ)	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Firsthand Technology Value Fund	\$1,001 - \$15,000	None	NONE	
	Wachovia Bank Acct	\$15,001 - \$50,000	INTEREST	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Edward J. Markey

Page 4 of 7

SP	Wachovia Bank Accts	\$100,001 - \$250,000	INTEREST	\$201 - \$1,000	Reinvested
SP	Morgan Stanley Dean Witter IRA - S+P Depository Receipts	\$1 - \$1,000	None	NONE	
SP	Morgan Stanley Dean Witter IRA - Liquid Asset Fund	\$1 - \$1,000	None	NONE	
SP	Janus Orion fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	Reinvested
SP	Fidelity SEP - Spartan Ext Market Index Investor Class	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	Reinvested
SP	Janus Global Technology Fund	\$15,001 - \$50,000	None	NONE	
SP	Old Mutual Columbus Circle Technology & Communications Fund	\$1,001 - \$15,000	None	NONE	

SP	Firsthand Technology Value Fund	\$50,001 - \$100,000	None	NONE	
SP	Morgan Stanley Dean Witter IRA - Power Shares QQQ Trust	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	Reinvested
SP	Fidelity Municipal Money Market	\$100,001 - \$250,000	DIVIDENDS	\$2,501 - \$5,000	Reinvested
SP	Fidelity SEP - Fidelity Cash Reserve	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	Reinvested
SP	Rydex OTC Fund	\$100,001 - \$250,000	None	NONE	
SP	TIAA-CREF Traditional Retirement Annuity	\$100,001 - \$250,000	INTEREST	\$5,001 - \$15,000	Reinvested
SP	TIAA-CREF Retirement Annuity CREF Equity Index	\$100,001 - \$250,000	None	NONE	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Edward J. Markey

Page 5 of 7

SP	R.S. Emerging Growth Fund	\$15,001 - \$50,000	None	NONE	
SP	Global Health Institute, LLC, Chevy Chase, MD (Nature of Business: Health Education and Services)	\$50,001 - \$100,000	Interest, Salary See Schedule I	\$201 - \$1,000	
SP	Chevy Chase Bank Accts	\$50,001 - \$100,000	INTEREST	\$201 - \$1,000	

SCHEDULE IV - TRANSACTIONS

Name Edward J. Markey

Page 6 of 7

Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
SP	Fidelity SEP - Fidelity Cash Reserve	P	04-11-08	\$1,001 - \$15,000
SP	Fidelity Municipal Money Market	P	Monthly dividend reinvestment	\$1,001 - \$15,000
SP	Chevy Chase Bank Accts (opened 2 accts)	P	9/02/08	\$50,001 - \$100,000

SCHEDULE VIII - POSITIONS

Name Edward J. Markey

Page 7 of 7

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
Board Member (Associate)	Boston College Law School Board of Advisors (uncompensated)