



Filing ID #10011070

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ami Bera  
**Status:** Member  
**State/District:** CA07

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2015  
**Filing Date:** 05/16/2016

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
1524 32nd Street, Sacramento, CA  LOCATION: Sacramento, CA, US	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
2101 39th Street, Sacramento, CA  LOCATION: Sacramento, CA, US	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
2231 36th Street, Sacramento, CA  LOCATION: Sacramento, CA, US	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
2536 39th Street, Sacramento, CA  LOCATION: Sacramento, CA, US	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
2642 43rd Street, Sacramento, CA  LOCATION: Sacramento, CA, US	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
2717 P Street, Sacramento, CA	JT	\$500,001 - \$1,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Sacramento, CA, US					
4601 V Street, Sacramento, CA	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Sacramento, CA, US					
4640 U Street, Sacramento, CA	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Sacramento, CA, US					
6211 Broadway, Sacramento, CA	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Sacramento, CA, US					
6337 Rampart, Sacramento, cA	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Sacramento, CA, US					
American Cent Inter	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
amg yacktman focus	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Baird Core Plus Bond	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
BGI US Equity Account 1	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
BGI US Equity-Account 2	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Capital Guardian- Account 1	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
Capital Guardian- Account 2	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
EG Shares	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Elk Grove Commerce Bank	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
First Trust Morningstar Dividend	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fixed Income Fund	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Golden One Credit Union	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Guggenheim ETF	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Guggenheim ETF- Account 1		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Harding Loevner Emerging	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
India Fund	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Invesco Convertable	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares Core S&P- Account 3	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
iShares Core S&P-Account 1		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares Core S&P-Account 2	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares MSCI CDA	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Ishares MSCI Emerging Markets	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares MSCI Growth	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares MSCI Japan	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares Nasdaq Biotechnology	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares S&P 500 Value	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares S&P Growth	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares SPDR Industrial Select	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares TR MSCI EAFE	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Janus Balanced Fund	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Metropolis Investment Total	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Oakmark International Fund Class	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Oppenheimer Developing	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Oppenheimer Global S	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Oppenheimer S	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Parnassus Core Equity	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Parnassus Core Equity Fund	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Pimco Total Return	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Powershares Variabke	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Promissory Note Colonial Mutual	JT	\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
Safe Credit Union	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab 529 Plan	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
Schwab Checking	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab Fundamental Intl	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Money Market Funds	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab Muni Money Fund	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Scout International Fund- Account 2	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Scout International Fund-Account 1	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Scout Small Cap		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Sector SPDR Energy Select		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Sector SPDR Financial	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Sector SPDR Industrial Select	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Sector SPDR Materials Fund	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Sector SPDR Tech Select	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SPDR S&P International Dividend	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SPDR S&P Regional Banking	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
T Rowe Price Global		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TPMG Conservative	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
TPMG Mod- Account 2	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
TPMG Moderate Account 1	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
UBS Global Asset	SP	\$100,001 -	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$250,000			
Vangard CA Inter Term	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vangard FTSE Emerging	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Walt Disney Company (DIS)	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Wells Fargo Checking	JT	\$50,001 - \$100,000	Dividends, Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Savings	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Safe Credit Union	November 2008	Morgage, Elk Grove, CA	\$250,001 - \$500,000
JT	Bank of America	March 2008	Mortgage on Rental, Sacramento, CA	\$100,001 - \$250,000
JT	Coldwell Banker Home Loans	June 2008	Mortgage on Rental, Sacramento, CA	\$100,001 - \$250,000
JT	Coldwell Banker Home Loans	June 2009	Mortgage on Rental, Sacramento, CA	\$100,001 - \$250,000
JT	Coldwell Banker Home Loans	June 2006	Mortgage on Rental Property, Sac CA	\$100,001 - \$250,000
JT	Coldwell Banker Home Loans	June 2008	Mortgage on Rental Property, Sac CA	\$100,001 - \$250,000
JT	Evergreen Mortgage	January 2013	Mortgage ,Washington DC	\$250,001 -

Owner	Creditor	Date Incurred	Type	Amount of Liability
				\$500,000
JT	Coldwell Banker Home Loans	June 2011	Mortgage on Rental Property, Sac CA	\$100,001 - \$250,000
JT	Coldwell Banker Home Loans	November 2009	Mortgage on Rental, Sacramento, CA	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Clinical Professor of Medicine	University of CA, Davis
CEO, President	Mango Management Inc

## SCHEDULE F: AGREEMENTS

None disclosed.

## 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?
MECEA	12/19/2015	12/23/2015	Washington, DC - Seoul, South Korea - Sacramento	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Alliance for Health Reform and The Commonwealth Fund	02/20/2015	02/22/2015	Los Angeles, CA - Houston, TX - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stanford University	05/28/2015	05/29/2015	Sacramento, CA - Palo Alto, CA - Sacramento, CA	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
German Marshall Fund of the US; Robert Bosch Stiftung	04/5/2015	04/12/2015	Sacramento, CA - Berlin, Germany - Elmau, Germany - Washington, DC	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.

## 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. Ami Bera , 05/16/2016