



Filing ID #10006799

# FINANCIAL DISCLOSURE REPORT

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Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

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## FILER INFORMATION

**Name:** Hon. Donald W. Norcross  
**Status:** Member  
**State/District:** NJ01

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2014  
**Filing Date:** 05/14/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ACC Market Strategy Certificate	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	Not Applicable
Am Cent VP Intl Cl II		\$1,001 - \$15,000	Dividends	None	Not Applicable
AM FDS American Balanced Fund	SP	\$15,001 - \$50,000	Tax-Deferred		
AM FDS Washington Mutual	SP	\$15,001 - \$50,000	Tax-Deferred		
American Express Bank	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
Ameriprise Cert. Co.	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	Not Applicable
BARON Growth Inst SHS	SP	\$15,001 - \$50,000	Tax-Deferred		
Calvert High Yield Bond CL A	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	Not Applicable

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Citibank NA		\$1,001 - \$15,000	None		
Columbia Convertible Securities CL A		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Columbia Diversified Equity Income Fund Class A	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Columbia Dividend Oppty CL A	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Columbia Global Infrastructure CL A	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Columbia Hgh Yld Bd Cl3	SP	\$1,001 - \$15,000	Dividends	None	Not Applicable
Columbia Hgh Yld Bd Cl3		\$1,001 - \$15,000	Dividends	None	Not Applicable
Columbia High Yield Bond CL A	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	Not Applicable
Columbia Intl OpF Cl3	SP	\$1,001 - \$15,000	Dividends	None	Not Applicable
Columbia Marsico Grth		\$15,001 - \$50,000	Dividends	None	Not Applicable
Columbia Mid Cap Gr Cl3	SP	\$1,001 - \$15,000	Dividends	None	Not Applicable
Columbia Seligman Communications & Information CL A	JT	\$1,001 - \$15,000	Dividends	None	Not Applicable
Columbia VP Div Bond Cl 3	SP	None	Dividends	None	Not Applicable
Columbia VP Div Bond Cl3		None	Dividends	None	Not Applicable
Columbia VP Divdnd Opp Cl3		None	Dividends	None	None
Columbia VP Divnd Opp Cl3	SP	\$1,001 - \$15,000	Dividends	None	Not

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
					Applicable
Columbia VP Global Bnd Cl3	SP	\$1,001 - \$15,000	Dividends	None	Not Applicable
Columbia VP Lg C Quan Cl3	SP	\$15,001 - \$50,000	Dividends	None	Not Applicable
Eaton Vance Global Macro Absolute Return CL A	JT	\$1 - \$1,000	Dividends	\$1 - \$200	Not Applicable
Express Scripts Holding Company (ESRX)	SP	\$1,001 - \$15,000	Dividends	None	Not Applicable
Fid VIP Midcap Cl 2		\$1,001 - \$15,000	Dividends	None	Not Applicable
Fidelity Advisor Floating Rate High Income CL A	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	Not Applicable
Fidelity Advisor Materials CL A	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Fidelity Advisor New Insights CL A		\$15,001 - \$50,000	Dividends	None	Not Applicable
Fidelity Advisor Strategic Dividend & Income CL A		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Contrafund		\$100,001 - \$250,000	Tax-Deferred		
First TN		\$1 - \$1,000	None		
Franklin Income CL A	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Franklin Rising Dividends	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Franklin Small Cap Growth CL A		\$1,001 - \$15,000	Dividends	None	Not Applicable
Guaranteed Deposit Fund		\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
		\$100,000			
Healthcare Employees Federal Credit Union	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
International Blend/Lazard		\$100,001 - \$250,000	Tax-Deferred		
IShares Core S&P 500	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
IShares MSCI EAFE	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
IShares Russell 2000	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
IShares Russell Mid Cap	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	Not Applicable
Janus Overseas CL A		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Jennison Growth		\$100,001 - \$250,000	Tax-Deferred		
KBS Real Estate Investment Trust Inc	SP	\$1,001 - \$15,000	Dividends	None	Not Applicable
MAINSTY Large Cap Growth Fund Class I	SP	\$15,001 - \$50,000	Tax-Deferred		
Manning & Napier Target income		\$15,001 - \$50,000	Tax-Deferred		
MFS Diversified Income CL A	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
MFS Research Intl CL A	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
New Jersey Defined Contribution Retirement plan		\$15,001 - \$50,000	Tax-Deferred		
Oppenheimer Steelpath MLP ALPHA CL A		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PIMCO Total Return Inst	SP	\$1,001 - \$15,000	Tax-Deferred		
Prudential Retirement Real Estate Fund		\$15,001 - \$50,000	Tax-Deferred		
Putn VT Mult Cap Gr IB		None	None		
Susquehanna Bank	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
T Rowe Price Mid Cap Value	SP	\$15,001 - \$50,000	Tax-Deferred		
TD Bank	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
Templeton Foreign Adv	SP	\$15,001 - \$50,000	Tax-Deferred		
Thornburg International		None	Tax-Deferred		
Toronto Dominion Bank (TD)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	Not Applicable
Toronto Dominion Bank (TD)	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	Not Applicable
Union Building Trades Federal Credit Union	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	Not Applicable
Vanguard Mid Cap Index Signal fund		\$100,001 - \$250,000	Tax-Deferred		
Vanguard Small Cap Index		\$50,001 - \$100,000	Tax-Deferred		
Wanger USA		\$15,001 - \$50,000	Dividends	None	Not Applicable
Weaver Barksdale Fixed Income Fund		\$100,001 - \$250,000	Tax-Deferred		
Wells Fargo Advantage Wealthbuilder Growth Balanced	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo Bank NA		\$1 - \$1,000	None		
WFADV VT Sm Cap Grow	SP	\$1,001 - \$15,000	Dividends	None	Not Applicable

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount Current Year to Filing	Amount Preceding Year
IBEW Local 351	Salary	N/A	\$194,655
State of New Jersey	Salary	N/A	\$40,030
Virtua West Jersey Health Systems	Spouse Salary	N/A	N/A

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Suntrust	June, 2012	Mortgage	\$250,001 - \$500,000
	TD Bank	October 2014	Personal Loan to Campaign	\$50,001 - \$100,000
	Ameriprise	October 2014	Personal Loan to Campaign	\$50,001 - \$100,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
Board Member	United Way of Greater Philadelphia and Southern New Jersey
Vice-Chair	Home Port Alliance for the USS New Jersey
Trustee	Union Organization for Social Service

**SCHEDULE F: AGREEMENTS**

None disclosed.

**SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

## **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**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. Donald W. Norcross , 05/14/2015