

UNITED STATES HOUSE OF REPRESENTATIVES

FORM A

CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

For use by Members, officers, and employees

LEGISLATIVE RESOURCE CENTER

Representative Steven L. Kagen

(202)225-5665

(Full Name)

(Daytime Telephone)

2009 MAY -5 AM 11:32

U.S. (Office Use Only)

Filer ☒ Member of the U.S. House of Representatives

State: WI District: 8

☐ Officer Or Employee

Employing Office:

Report Type

☒ Annual (May 15)☐ Amendment☐ Termination

Termination Date:

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 \$35 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 \$35 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 type="checkbox"/> No <input checked="" 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 checked="" type="checkbox"/> No <input 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 III -ASSETS AND "UNEARNED" INCOME

Name Rep. Steven L Kagen

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset		BLOCK C Type of Income		BLOCK D Amount of Income		BLOCK E Transaction	
<p>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 asset or source of income which generated more than \$200 in "unearned" income during the year. For rental property or land, provide an address. Provide full names of any mutual funds. For a self-directed IRA (i.e., one where you have the power to select the specific investments), provide information on each asset in the account that exceeds the reporting threshold, and the income earned for the account. For an IRA or retirement plan that is not self-directed, name the institution holding the account and provide its value at the end of the reporting period. For an active business that is not publicly traded, in Block A state the nature of the business and its geographic location. For additional information, see the instruction booklet for the reporting year.</p> <p>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.</p> <p>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.</p>		<p>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 generated income, the value should be "None."</p>		<p>Check all columns that apply. Leave blank if asset did not generate any income during the calendar year.</p>		<p>For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, indicate the category of income by checking the appropriate box below. Dividends, even if reinvested, should be listed as income. Check "None" if no income was received.</p>		<p>Indicate if asset was purchased (P), sold (S), or exchanged (E) in reporting year.</p>	
		<p>None</p> <p>A B C D E F G H I J K L</p>		<p>DIVIDENDS</p> <p>RENT</p> <p>INTEREST</p> <p>CAPITAL GAIN</p> <p>ORIGINAL ISSUE DISCOUNT</p> <p>EXCEPTED TRUST</p> <p>QUALIFIED BLIND TRUST</p> <p>Other Type of Income (Specify)</p>		<p>I II III IV V VI VII VIII IX X XI</p> <p>None</p> <p>\$1-\$200</p> <p>\$201-\$1,000</p> <p>\$1,001-\$2,500</p> <p>\$2,501-\$5,000</p> <p>\$5,001-\$15,000</p> <p>\$15,001-\$50,000</p> <p>\$50,001-\$100,000</p> <p>\$100,001-\$1,000,000</p> <p>\$1,000,001-\$5,000,000</p> <p>Over \$5,000,000</p>		<p>P, S, E</p>	

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BLOCK A	BLOCK B	BLOCK C	BLOCK D	BLOCK E
Asset and/or Income Source	Value of Asset at close of reporting year.	Type of Income	Amount of Income	Trans- action
A	B	C	D	E
F	G	H	I	J
K	L	M	N	O
P	Q	R	S	T
U	V	W	X	Y
Z	[None]	Dividends	Other Type of Income (Specify)	[None]
AA	\$1-\$100	Rent	\$1-\$200	
AB	\$101-\$1000	Interest	\$201-\$1,000	
AC	\$1001-\$5000	Capital Gain	\$1,001-\$2,500	
AD	\$5001-\$10000	Original Issue Discount	\$2,501-\$5,000	
AE	\$10001-\$50000		\$5,001-\$15,000	
AF	\$50001-\$100000		\$15,001-\$50,000	
AG	\$100001-\$500000		\$50,001-\$100,000	
AH	\$500001-\$1,000,000		\$100,001-\$1,000,000	
AI	\$1,000,001-\$5,000,000		\$1,000,001-\$5,000,000	
AJ	\$5,000,001-\$25,000,000		Over \$5,000,000	
AK	Over \$25,000,000			
Govt Natl Mtg Assn., 12%, due 3/15/15				P
Greater Clark Cmty Sch Bldg Corp Ind Jeffersonville NR, due 07/15/18				P
Green Bay WI GO Corp Pulp BdSAAZ, due 04/01/18				P
Green Bay WI Met Swr Dist GO Sew Sys, due 05/01/18				P
Greensburg IN Sch Bldg, 4%, 7/15/14, due 7/15/13				
Greenwood In Sch Bldg, 4%, 7/15/19, due 7/15/19				
Guam Power Auth Rev Bonds, 5.25%, due 10/01/23				
Hanover Multi School, 4%, due 7/15/19				
Home Depot Inc.				
JP Morgan Chase Bank Accounts, Appleton, WI				
Kane Cmty IL Sch Dist Go Bonds, 0%, due 6/01/08				S
Kenosha Cmty WI Go Bonds, 4%, due 12/01/17				
Lake Cmty II Cmnty Go FGIC Cap Appri HSD #127 Grayslake Ser B				
Lake Cmty Ind PK Dist, 4%, due 12/31/15				
Lawrenceburg IN Sch Bldg, 4.125%, due 7/15/22				
Madison WI Met Sch Go Bonds, 4%, due 3/1/19				
Mandan ND Go Bonds, 4%, due 5/01/21				
Mankato MN Go Bonds, 4%, due 2/01/16				
Maple Grove MN Go, 4%, due 2/01/19				
Marion Cmty IN Convrtn Bonds, 5%, due 6/01/27				
Marysville OH Wastewater, 4%, due 12/01/13				
Mc Henry Cmty II Cmnty Go HSD Apprec Bonds				
Menomonee Falls WI Go Bond, 4%, due 5/01/16				
Microsoft Corporation Stock				
Milwaukee Cmty WI, 3.9%, due 8/01/17				
Milwaukee WI Redevel Auth Bonds, 4.125%, due 8/01/18				
Milwaukee WI Redevel Auth, 4%, due 8/01/23				
Milwaukee WI Redevel Rev, 3%, due 8/01/10				
Mounds View MN Go Isd, 5%, due 2/01/08				S
Mukwonago WI Go Bonds, 4%, due 10/01/18				

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BLOCK A	BLOCK B	BLOCK C	BLOCK D	BLOCK E
Asset and/or Income Source	Value of Asset at close of reporting year.	Type of Income	Amount of Income	Trans- action
	A None B \$1-\$1,000 C \$1,001-\$15,000 D \$15,001-\$50,000 E \$50,001-\$100,000 F \$100,001-\$250,000 G \$250,001-\$500,000 H \$500,001-\$1,000,000 I \$1,000,001-\$5,000,000 J \$5,000,001-\$25,000,000 K \$25,000,001-\$50,000,000 L Over \$50,000,000	DIVIDENDS RENT INTEREST CAPITAL GAIN ORIGINAL ISSUE DISCOUNT Other Type of Income (Specify)	I None II \$1-\$200 III \$201-\$1,000 IV \$1,001-\$2,500 V \$2,501-\$5,000 VI \$5,001-\$15,000 VII \$15,001-\$50,000 VIII \$50,001-\$100,000 IX \$100,001-\$1,000,000 X \$1,000,001-\$5,000,000 XI Over \$5,000,000	P, S, E
New York NY Go Bonds, 3.625%, due 8/01/10	X		X	
North Dakota St Bldg Bonds, 4%, due 12/01/18		X	X	
Novi Mich Cmnty Sch Go, 4%, due 5/01/20	X	X	X	
Olmsted Cnty MN Go, 4.125%, due 02/01/24	X		X	
Oregon WI Sch dist Go Bonds, 4%, due 4/01/13	X	X	X	
Orono MN Hsg & Redev Bonds, 3.2%, due 2/01/15	X	X	X	
Osakis MN Isd #213 Go Bonds, 4%, due 02/01/17	X	X	X	
Pine Grove PA Area Sch Dist GO School Bds Series AA3, due 09/01/13	X	X	X	P
Puerto Rico Commonwealth Go Bonds, 4.875%, due 7/01/23	X	X	X	S
Puerto Rico Indl Med Rv Bonds, 5.1%, due 12/01/18	X	X	X	
Series HH/H US Savings Bonds	X	X	X	
Southeast WI Pro Baseball Bonds, 0%, due 12/15/13	X	X	X	
St Joseph Cnty IN Econ Bonds, 4.250%, due 4/01/24	X	X	X	
St Paul MN Cap Improvement Go Bonds, 4.125%, due 10/01/20	X	X	X	
St. Francis MN Isd Go Bonds, 4%, due 2/01/21	X		X	
Streettracks Gold Trust ETF	X			P
Tamarack Tax Free Money Market		X	X	
Tri-Creek 2002 High Bonds, 4.250%, due 01/15/23	X	X	X	
US Treasury Bond Sec, 0%, due 11/15/16	X		X	
US Treasury Bond Sec, 0%, due 11/15/17	X			
US Treasury Bond Sec, 0%, due 2/15/19	X			
US Treasury Bond Sec, 0%, due 5/15/20	X			
US Treasury Bond Sec, 0%, due 8/15/18	X			
Valparaiso IN Sewer Rev Bonds, 4.5%, due 8/01/24	X		X	
Warsaw IN Multi-Sch Bldg Bonds, 4%, due 7/15/19	X	X	X	
Waterville, MN Go Bonds, 4%, due 12/01/13	X	X	X	
Waupun WI Sch Dist Go Bonds, 4.750%, due 4/01/18	X	X	X	
Wayne Twp IN Marion Rev Bonds, 2.350%, due 7/15/08	X	X	X	S
Will & Kendall Cntys Go Bonds, 4.250%, due 01/01/23	X	X	X	
Will Cnty IL Cmnty USD Bonds, 0%, due 11/01/18	X	X	X	

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SCHEDULE IX - AGREEMENTS

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.

Date	Parties To	Terms of Agreement
January 2, 2007	Steven L Kagen & Kagen Allergy Clinic, S.C.	Steven L Kagen, M.D. may be employed by the Kagen Allergy Clinic, S.C. from time to time during official holidays while serving as a U.S. Representative, at no compensation, and any and all revenue generated from such activity shall be the sole property of Kagen Allergy Clinic, S.C.
		Compensation to Steven L. Kagen shall be restricted to (a) paying for his medical malpractice insurance coverage and (b) any ordinary overhead - related expenses for his service to Kagen Allergy Clinic, S.C.
		patients. Steven L. Kagen did not work for Kagen Allergy Clinic, S.C. in 2008.
		Steven L Kagen received pass-through payments of accounts receivable for services rendered prior to becoming a member of the U.S. Congress.