



Filing ID #10008309

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Derek Kilmer  
**Status:** Member  
**State/District:** WA06

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2014  
**Filing Date:** 07/27/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Amcap Fund Cl A	SP	\$1 - \$1,000	Tax-Deferred	None	<input type="checkbox"/>
American Capital Income Builder Fund	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
American Capital Income Builder Fund		\$1,001 - \$15,000	None		<input type="checkbox"/>
American Century Eq. Growth Inv	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
American Funds 403b ⇒ Bond Fund of America A		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds 403b ⇒ SPTN 500 Index Inst		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
American Funds 403b ⇒ Sptn US Bond Index IS		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
American Mutual Fund Cl A	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Artisan Mid Cap Inst.	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Bank of America Checking	JT	\$1 - \$1,000	None	<input type="checkbox"/>
Blkrk Equity Div 1	SP	\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
Capital Income Builder Fund Cl A	SP	\$15,001 - \$50,000	Tax-Deferred	None <input type="checkbox"/>
Capital World Growth & Income Fund Cl A	SP	\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
Edward Jones ⇒ Capital Income Builder Fund CL A		\$15,001 - \$50,000	Tax-Deferred	None <input type="checkbox"/>
Edward Jones ⇒ Invesco American Value Fund Class A		\$15,001 - \$50,000	Tax-Deferred	None <input type="checkbox"/>
Edward Jones ⇒ Invesco Comstock Fund Cl A		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Edward Jones ⇒ Invesco Corporate Bond Fund CL A		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
Edward Jones ⇒ Invesco Growth & Income Fund Cl A		\$15,001 - \$50,000	Tax-Deferred	None <input type="checkbox"/>
Edward Jones ⇒ Invesco Short Term Bond Fund Cl A		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
Edward Jones ⇒ Invesco Small Cap Value FUnd Cl A		\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
Edward Jones Insured Bank Money Market	JT	\$1 - \$1,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Fidelity Low Priced Stock	SP	\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
Fidelity SEL Technology	SP	\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
Growth Fund of America Cl A	SP	\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>
Hrdg Lvnr Intl Equity IS	SP	\$1,001 - \$15,000	Tax-Deferred	None <input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Investment Co of America A	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
JPM Sr Blend 2020 R5 formerly Fid. freedom 2020	SP	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Kitsap Bank Checking	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
McKinsey & Co. Profit Sharing Retirement Plan and Money Purchase Pension Plan		\$100,001 - \$250,000	Tax-Deferred	None	<input type="checkbox"/>
Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
New Perspective Fund A	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Perkins Mid Cap Val T	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Smallcap World Fund Cl A	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Vang Selected Value	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
WA State PERS Plan 2	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
WA STate PERS Plan 2		\$1,001 - \$15,000	None		<input type="checkbox"/>
Washington Mutual Investors Fund Cl A	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

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

**SCHEDULE B: TRANSACTIONS**

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Perkins Mid Cap Val T	SP	08/21/2014	S	\$1,001 - \$15,000	<input type="checkbox"/>
COMMENTS: My 401k changed its mutual fund selection.					
Vanguard Select Value Fund	SP	08/21/2014	P	\$1,001 - \$15,000	
COMMENTS: My 401k changed its mutual fund selection.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount
Washington State Historical Society	SP - salary	N/A

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Kitsap Bank	December 2005	Home Equity Line of Credit	\$15,001 - \$50,000
JT	Bank of America	Revolving	Credit card	\$10,000 - \$15,000
JT	Chase Mortgage	2001	Mortgage on residence	\$100,001 - \$250,000

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
January 2005	State of Washington	Public Employees Retirement System Plan 2

**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?
Information Technology and Innovation Foundation	02/18/2014	02/21/2014	Seattle, WA - Miami, FL - Seattle, WA	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- American Funds 403b
- Edward Jones

## 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. Derek Kilmer , 07/27/2015