HAND DELIVERED

UNITED STATES HOUSE OF REPRESENTATIVES
CALENDAR YEAR 2009 FINANCIAL DISCLOSURE STATEMENT

FORM A
For use by Members, officers, and employees

LEGISLATIVE RESOURCE CENTER
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OFFICE OF THE CLERK U.S. HOUSE OF REPRESENTATIVES

MC

Edward J. Markey (Full Name)

202-225-2836 (Daytime Telephone)

(Office Use Only)

Filer Status	☑ Member of the U.S. House of Representative — State: MA District: 07	☐ 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? **If yes, complete and attach Schedule I.**	Yes ☑ No ☐
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? **If yes, complete and attach Schedule II.**	Yes ☐ No ☑
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? **If yes, complete and attach Schedule III.**	Yes ☑ No ☐
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? **If yes, complete and attach Schedule IV.**	Yes ☑ No ☐
V.	Did you, your spouse, or a dependent child have any reportable liability (more than $10,000) during the reporting period? **If yes, complete and attach Schedule V.**	Yes ☐ No ☑
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)? **If yes, complete and attach Schedule VI.**	Yes ☐ No ☑
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)? **If yes, complete and attach Schedule VII.**	Yes ☐ No ☑
VIII.	Did you hold any reportable positions on or before the date of filing in the current calendar year? **If yes, complete and attach Schedule VIII.**	Yes ☑ No ☐
IX.	Did you have any reportable agreement or arrangement with an outside entity? **If yes, complete and attach Schedule IX.**	Yes ☐ No ☑

Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.

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 ☐ No ☑
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 ☐ No ☑

SCHEDULE I - EARNED INCOME

Name Edward J. Markey

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
University of South Florida	Spouse - Lecture Fees	$9,000
MediMedia	Spouse - Lecture Fees	$7,500
Milliken University	Spouse - Lecture Fees	$9,140
Brookings Institute - Washington University	Spouse - Lecture Fees	$1,000

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Edward J. Markey

	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.
	Cong. Federal Credit Union Accts	$1,001 - $15,000	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	
JT	Wachovia Bank Acct	$15,001 - $50,000	INTEREST	$1 - $200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	Wachovia Bank Acct	$100,001 - $250,000	INTEREST	$1 - $200	
SP	Morgan Stanley Dean Witter IRA - S+P Depository Receipts (SPDR)	$1,001 - $15,000	DIVIDENDS	$1 - $200	Reinvested
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 Invester Class	$1,001 - $15,000	DIVIDENDS	$201 - $1,000	Reinvested
SP	Janus Global Technology Fund	$50,001 - $100,000	None	NONE	
SP	Old Mutual Focused Fund Cl Z (formerly Old Mutual Columbus Circle Technology & Communications Fund	$1,001 - $15,000	DIVIDENDS	$1 - $200	Reinvested
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	$1 - $1,000	DIVIDENDS	$1 - $200	PS(part)
SP	Fidelity SEP - Fidelity Cash Reserves	$50,001 - $100,000	DIVIDENDS	$201 - $1,000	P
SP	Rydex OTC Fund	$100,001 - $250,000	None	NONE	
SP	TIAA-CREF Traditional Retirement Annuity	$100,001 - $250,000	INTEREST	$2,501 - $5,000	Reinvested

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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SP	TIAA-CREF Retirement Annuity CREF Equity Index	$100,001 - $250,000	Unrealized Growth	NONE	Reinvested
SP	R.S. Small Cap Growth Class A (formerly R.S. Emerging Growth Fund)	$50,001 - $100,000	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	$1 - $200	
SP	Chevy Chase Bank Accts	$50,001 - $100,000	INTEREST	$201 - $1,000	
SP	Fidelity Mass Muni Income	$50,001 - $100,000	INTEREST	$1,001 - $2,500	P
SP	Fidelity Mass AMT Tax-free Money Market	$50,001 - $100,000	INTEREST	$1 - $200	P

SCHEDULE IV - TRANSACTIONS

Name Edward J. Markey

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	Capital Gain in Excess of $200?	Date	Amount of Transaction
SP	Fidelity Municipal Money Market	S	No	03/03/09	$1,001 - $15,000
SP	Fidelity SEP - Fidelity Cash Reserves	P	N/A	03/03/09	$1,001 - $15,000
SP	Fidelity SEP - Fidelity Cash Reserves	P	N/A	04/14/09	$15,001 - $50,000
SP	Fidelity Municipal Money Market	S	No	06/09/09	$15,001 - $50,000
SP	Fidelity Mass Muni Income	P	N/A	06/08/09	$15,001 - $50,000
SP	Fidelity Municipal Money Market	S	No	06/16/09	$50,001 - $100,000
SP	Fidelity Mass AMT Tax-Free Money Market	P	N/A	06/16/09	$50,001 - $100,000
SP	Fidelity Municipal Money Market	P	N/A	Monthly dividend reinvestment	$1,001 - $15,000

SCHEDULE VIII - POSITIONS

Name Edward J. Markey

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)