



Filing ID #10010563

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Sander M. Levin
Status: Member
State/District: MI09

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?
1/2 interest in 78 acres LOCATION: Tyrone Township, Livingston County, MI, US		\$151,300.00	None		<input type="checkbox"/>
1/6 interest in 18 acres LOCATION: Tyrone Township, Livingston County, MI, US		\$13,467.00	None		<input type="checkbox"/>
1/9 undivided interest in Levinson-Levin Properties, L.L.C., commercial real estate, West Maple LOCATION: Birmingham, MI, US		\$126,147.00	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
1/9 undivided interest in Levinson-Levin Properties, L.L.C., commercial real estate, West Maple LOCATION: Birmingham, MI, US		\$67,711.00	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
5.3% interest in Michigan mineral rights previously held by LNS Co., a general partnership now liqui DESCRIPTION: Muskegon Development Co., an assignee from previous lease - \$60.00; Breitburn Operating LP - income - \$811; Merit Energy Co. - income - \$1,486; Linn Operating Inc., - income - \$2,383. The year-end value of these interests are estimated herein based on latest available information and technical advice.		\$15,001 - \$50,000	Royalties	\$4,740.00	<input type="checkbox"/>
Congressional Federal Credit Union		\$15,400.00	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
First National Bank	SP	\$73,334.87	None		<input type="checkbox"/>
House, Lot 4, West Tisbury, Mass. (subject to Quicken Loan Mortgage)		\$1,325,400.00	Rent	\$29,075.00	<input type="checkbox"/>
LOCATION: West Tisbury, MA, US					
IRA ⇒ First National Bank Certificate of Deposit	SP	\$7,979.23	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ First National Bank Certificate of Deposit	SP	\$14,068.63	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Security Benefit: Variflex Qualified Variable Annuity	SP	\$47,589.42	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Univ. of Houston Texas Optional Retirement Program: TIAA Traditional	SP	\$121,587.75	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Bond Fund of America CL C		\$93,310.00	Dividends	\$1,106.30	<input type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Capital Income Builders CL C		\$109,038.00	Dividends	\$2,962.49	<input type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Income Fund of America CL C		\$109,813.00	Capital Gains, Dividends	\$4,769.99	<input checked="" type="checkbox"/>
Merrill Lynch IRA ⇒ American Bond Fund of America CL C		\$1,485.62	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ American Capital Income Builder CL C		\$16,658.20	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ American Capital Income Builder CL F1		\$18,207.10	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ American Income Fund of America CL C		\$50,620.00	Tax-Deferred		<input type="checkbox"/>
Penn State Federal Credit Union	SP	\$79,595.60	Interest	\$15.00	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Penn State University Alternate Retirement Plan ⇒ CREF Global Equities	SP	\$182,657.26	Tax-Deferred		<input type="checkbox"/>
Penn State University Alternate Retirement Plan ⇒ CREF Social Choice	SP	\$189,753.88	Tax-Deferred		<input type="checkbox"/>
Penn State University Alternate Retirement Plan ⇒ TIAA Traditional	SP	\$226,855.06	Tax-Deferred		<input type="checkbox"/>
Penn State University Tax Deferred Annuity Plan ⇒ CREF Global Equities	SP	\$102,750.06	Tax-Deferred		<input type="checkbox"/>
Penn State University Tax Deferred Annuity Plan ⇒ CREF Growth	SP	\$49,901.59	Tax-Deferred		<input type="checkbox"/>
Penn State University Tax Deferred Annuity Plan ⇒ CREF Social Choice	SP	\$306.40	Tax-Deferred		<input type="checkbox"/>
Penn State University Tax Deferred Annuity Plan ⇒ TIAA Traditional	SP	\$53,262.44	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Bank		\$1,571.00	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?
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Income Fund of America CL C		10/7/2015	S (partial)	\$10,000.01	<input checked="" type="checkbox"/>
Merrill Lynch - The Victoria S. Levin Special Legacy Trust ⇒ American Income Fund of America CL C		12/23/2015	P	\$1,982.13	

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Merrill Lynch	IRA Distribution	\$6,155.95
William and Mary College	Spouse Speech	\$500.00
Penn State Universisty	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Quicken Loans	September 2012	Mortgage West Tisbury, Massachusetts	\$391,046.40

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Levinson-Levin Properties, L.L.C.

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?
Aspen Institute Congressional Program	02/14/2015	02/22/2015	Detroit, MI - Panama City - Washington, DC	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"> ◦ IRA (Owner: SP) ◦ Merrill Lynch - The Victoria S. Levin Special Legacy Trust ◦ Merrill Lynch IRA ◦ Penn State University Alternate Retirement Plan (Owner: SP)

- Penn State University Tax Deferred Annuity Plan (Owner: SP)

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. Sander M. Levin , 05/16/2016