

# UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

**FORM A**  
For use by Members, officers, and employees

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**MAY 15 2009**

LEGISLATIVE RESOURCE CENTER

ADAM HUGHES PUTNAM

202-225-1252

2009 MAY 20 AM 11:23

(Full Name)

(Daytime Telephone)

U.S. HOUSE OF REPRESENTATIVES

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

State: FL  
District: 12

☐ 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 <input type="checkbox"/> No <input checked="" type="checkbox"/>	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 <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 <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 \$335 from one source)? If yes, complete and attach Schedule VII.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 <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? If yes, complete and attach Schedule VIII.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
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 <input type="checkbox"/> No <input checked="" type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule IX.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 <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.	

## EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION -- ANSWER EACH OF THESE QUESTIONS

<b>Trusts--</b> 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"/>
<b>Exemptions--</b> 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 ADAM HUGHES PUTNAM

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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.
PUTNAM GROVES, INC. OWNERSHIP SHARE FARMING-CITRUS & CATTLE BARTOW, FLORIDA BOOK VALUE	\$1,000,001 - \$5,000,000	S CORPORATION INCOME/None	\$100,001 - \$1,000,000	
DUDLEY PUTNAM, INC. OWNERSHIP SHARE CARETAKING-CITRUS & CATTLE BARTOW, FLORIDA BOOK VALUE	\$15,001 - \$50,000	None	NONE	
UNITED STATES SAVINGS BONDS	\$1,001 - \$15,000	INTEREST	DEFERRED TO MATURITY	
FLORIDA PREPAID COLLEGE PLAN	\$15,001 - \$50,000	None	NONE	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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PARTIAL INTEREST-OFFICE  
AND SHOP  
2310 80 FOOT ROAD  
BARTOW, FL 33830

\$15,001 -  
\$50,000

RENT

\$2,501 - \$5,000

MFS GROWTH ALLOCATION  
CLASS A

None

CAPITAL GAINS

\$5,001 - \$15,000

S

GOLDMAN SACHS TR  
EMERGING MKTS EQTY  
INSTL CL

None

CAPITAL GAINS

\$201 - \$1,000

S

T ROWE PRICE INSTL  
EQUITY FDS INC LARGE CAP  
GROWTH FUND

None

CAPITAL LOSS

LOSS

S

STI CLASSIC FUNDS LARGE  
CAP GROWTH STK I SHS  
#510 FKA CAPITAL  
APPRECIATION I SHS #510

None

CAPITAL GAINS

\$1 - \$200

S

STI CLASSIC FUNDS  
INTERNATIONAL EQUITY I  
SHS #540

None

CAPITAL GAINS

\$2,501 - \$5,000

S

STI CLASSIC FUNDS SMALL  
CAP VALUE EQUITY I SHS  
#588

None

CAPITAL LOSS

LOSS

S

STI CLASSIC FUNDS LARGE  
CAP RELATIVE VALUE I SHS  
#983

None

CAPITAL GAINS

\$2,501 - \$5,000

S

STI CLASSIC FUNDS SMALL  
CAP GROWTH CL C

None

CAPITAL LOSS

LOSS

S

STI CLASSIC FUNDS SMALL  
CAP VALUE EQUITY CL C

None

CAPITAL LOSS

LOSS

S

STI CLASSIC FUNDS MID CAP  
EQUITY CL C

None

CAPITAL GAINS

\$201 - \$1,000

S

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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STI CLASSIC FUNDS LARGE CAP VALUE EQUITY C	None	CAPITAL GAINS	\$201 - \$1,000	S
STI CLASSIC FUNDS LARGE CAP GROWTH STOCK CL C - FKA CAPITAL APPRECIATION CL C	None	CAPITAL LOSS	LOSS	S
SUN TRUST BANK ACCOUNTS	\$50,001 - \$100,000	INTEREST	\$1 - \$200	
STI CLASSIC FUNDS LARGE CAP QUAN EQUITY I SHS #624 FKA LARGE CAP QUAN EQUITY I SHS #666	None	CAPITAL LOSS	LOSS	S
MELLON INSTL FDS INV TR BOSTON CO SMALL CAP TAX SENSITIVE	None	CAPITAL LOSS	LOSS	S
FORUM FDS ABSOLUTE STRATEGIES FD INSTL SHS	None	CAPITAL LOSS	LOSS	S
T ROWE PRICE REAL ESTATE FD COM	None	CAPITAL GAINS	\$201 - \$1,000	S
PIMCO COMMODITY REALRETURN STRATEGY FD-INS	None	CAPITAL GAINS	\$201 - \$1,000	S
STI CLASSIC FUNDS TAX EXEMPT MONEY MARKET	None	None	NONE	
VANGUARD VALUE INDEX FUND	\$15,001 - \$50,000	DIVIDENDS	\$5,001 - \$15,000	PS(part)
STI CLASSIC FUNDS PRIME QUALITY MONEY MARKET	None	DIVIDENDS	\$201 - \$1,000	
VANGUARD LTD-TERM T/E FUND ADM	\$100,001 - \$250,000	INTEREST	\$2,501 - \$5,000	S(part)

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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VANGUARD INT-TERM T/E FUND ADM	\$100,001 - \$250,000	INTEREST	\$5,001 - \$15,000	S(part)
T ROWE PRICE EQUITY INCOME	\$15,001 - \$50,000	DIVIDENDS/CAPIT TAL GAINS	\$2,501 - \$5,000	
T ROWE PRICE BLUE CHIP GROWTH	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	
STI CLASSIC FUNDS AGGRESSIVE GROWTH STOCK 1 SHS #558	None	CAPITAL GAINS	\$1,001 - \$2,500	S
COLONIAL BANCORP STOCK	\$1,001 - \$15,000	DIVIDENDS	\$1,001 - \$2,500	
STI CLASSIC FUNDS EMERGING GROWTH STOCK 1 SHS #593	None	CAPITAL GAINS	\$201 - \$1,000	S
VANGUARD TOTAL INT'L INDEX FUND	\$100,001 - \$250,000	DIVIDENDS	\$2,501 - \$5,000	P
VANGUARD SMALL CAP VALUE INDEX FUND	\$50,001 - \$100,000	DIVIDENDS	\$1,001 - \$2,500	P
VANGUARD SMALL CAP GROWTH INDEX FUND	\$50,001 - \$100,000	DIVIDENDS	\$201 - \$1,000	P
VANGUARD MID-CAP INDEX FUND	\$100,001 - \$250,000	DIVIDENDS	\$2,501 - \$5,000	P
VANGUARD GROWTH INDEX FUND	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	PS(part)
VANGUARD T/E MONEY MARKET FUND	\$250,001 - \$500,000	INTEREST	\$5,001 - \$15,000	
VANGUARD LONG TERM T/E FUND	\$50,001 - \$100,000	INTEREST	\$2,501 - \$5,000	
VANGUARD HIGH YIELD T/E FUND	\$50,001 - \$100,000	INTEREST	\$2,501 - \$5,000	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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STI CLASSIC FUNDS MID-CAP VALUE EQUITY I SHS #412	None	CAPITAL GAINS	\$1 - \$200	S
COLONIAL BANGROUP BANK ACCOUNTS	\$500,001 - \$1,000,000	INTEREST	\$50,001 - \$100,000	
VANGUARD LARGE CAP INDEX FUND	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
COMMUNITY NATIONAL BANK ACCOUNTS	\$500,001 - \$1,000,000	INTEREST	\$5,001 - \$15,000	
VANGUARD PRIME MONEY MARKET FUND	\$1,001 - \$15,000	DIVIDENDS	\$1,001 - \$2,500	
VANGUARD TOTAL STOCK MARKET INDEX FUND ADM	\$250,001 - \$500,000	DIVIDENDS	\$2,501 - \$5,000	P
VANGUARD SMALL CAP INDEX FUND	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
VANGUARD 529 PLANS	\$50,001 - \$100,000	None	NONE	P

# SCHEDULE IV - TRANSACTIONS

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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	Date	Amount of Transaction
	STI CLASSIC FUNDS INTERNATIONAL EQUITY I SHS #540	S	01-07-08	\$1,001 - \$15,000
	MFS GROWTH ALLOCATION CLASS A	S	01-04-08	\$15,001 - \$50,000
	STI CLASSIC FUNDS LARGE CAP RELATIVE VALUE I SHS #983	S	01-07-08	\$15,001 - \$50,000
	VANGUARD VALUE INDEX FUND	PS(part)	11-25-08 S 01-17-08 P 02-21-08 P 08-26-08 P 10-23-08 P	\$100,001 - \$250,000

	GOLDMAN SACHS TR EMERGING MKTS EQTY INSTL CL	S	01-07-08	\$1,001 - \$15,000
	T ROWE PRICE INSTL EQUITY FDS INC LARGE CAP GROWTH FUND	S	01-07-08	\$1,001 - \$15,000
	STI CLASSIC FUNDS LARGE CAP GROWTH STK I SHS #510	S	01-07-08	\$15,001 - \$50,000
	STI CLASSIC FUNDS SMALL CAP VALUE EQUITY I SHS #588	S	01-07-08	\$1,001 - \$15,000
	STI CLASSIC FUNDS SMALL CAP GROWTH CL C	S	01-04-08	\$1,001 - \$15,000
	STI CLASSIC FUNDS SMALL CAP VALUE EQUITY CL C	S	01-04-08	\$1,001 - \$15,000

# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
	STI CLASSIC FUNDS MID CAP EQUITY CL C	S	01-04-08	\$1,001 - \$15,000
	STI CLASSIC FUNDS LARGE CAP VALUE EQUITY C	S	01-04-08	\$1,001 - \$15,000
	STI CLASSIC FUNDS LARGE CAP GROWTH STOCK CL C - FKA CAPITAL APPRECIATION CL C	S	01-07-08	\$1,001 - \$15,000
	STI CLASSIC FUNDS LARGE CAP QUAN EQUITY I SHS #624 FKA LARGE CAP QUAN EQUITY I SHS #666	S	01-07-08	\$1,001 - \$15,000
	MELLON INSTL FDS INV TR BOSTON O SMALL CAP TAX SENSITIVE	S	01-07-08	\$1,001 - \$15,000
	FORUM FDS ABSOLUTE STRATEGIES FD INSTL SHS	S	01-07-08	\$1,001 - \$15,000
	T ROWE PRICE REAL ESTATE FD COM	S	01-07-08	\$1,001 - \$15,000
	PIMCO COMMODITY REALRETURN STRATEGY FD-INS	S	01-07-08	\$1,001 - \$15,000
	VANGUARD VALUE INDEX FUND	PS(part)	11-25-08 S 01-17-08 P 02-21-08 P 08-26-08 P 10-23-08 P	\$100,001 - \$250,000
	VANGUARD LTD-TERM T/E FUND ADM	S(part)	12-18-08	\$15,001 - \$50,000



# SCHEDULE IV - TRANSACTIONS

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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	Date	Amount of Transaction
	VANGUARD INT-TERM T/E FUND ADM	S(part)	12-18-08	\$15,001 - \$50,000
	STI CLASSIC FUNDS AGGRESSIVE GROWTH STOCK I SHS #558	S	01-07-08	\$1,001 - \$15,000
	STI CLASSIC FUNDS EMERGING GROWTH STOCK I SHS #593	S	01-07-08	\$1,001 - \$15,000
	VANGUARD TOTAL INT'L INDEX FUND	P	12-18-08	\$1,001 - \$15,000
	VANGUARD SMALL CAP VALUE INDEX FUND	P	12-18-08	\$1,001 - \$15,000
	VANGUARD SMALL CAP GROWTH INDEX FUND	P	12-18-08	\$1,001 - \$15,000
	VANGUARD MID-CAP INDEX FUND	P	12-18-08	\$1,001 - \$15,000
	VANGUARD GROWTH INDEX FUND	PS(part)	11-25-08 S 01-17-08 P 02-21-08 P 08-26-08 P 10-23-08 P	\$100,001 - \$250,000
	STI CLASSIC FUNDS MID-CAP VALUE EQUITY I SHS #412	S	01-07-08	\$1,001 - \$15,000
	VANGUARD TOTAL STOCK MARKET INDEX FUND ADM	P	11-25-08 12-18-08	\$250,001 - \$500,000

# SCHEDULE IV - TRANSACTIONS

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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	Date	Amount of Transaction
	VANGUARD 529 COLLEGE PLANS	P	01-07-08	\$50,001 - \$100,000

# SCHEDULE VIII - POSITIONS

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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	SUCCESS BY SIX
ADVISORY BOARD MEMBER	VISTE
BOARD MEMBER	POLK COUNTY FAMILY CAREGIVERS
BOARD MEMBER	YOUNG PATRIOTS FOUNDATION