



Filing ID #10006829

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ami Bera  
**Status:** Member  
**State/District:** CA07

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2014  
**Filing Date:** 05/15/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset        | Income Type(s) | Income               | Tx. > \$1,000?           |
|--|-------|-----------------------|----------------|----------------------|--------------------------|
| 1524 32nd Street, Sacramento, CA<br><br>LOCATION: Sacramento, CA, US | JT    | \$250,001 - \$500,000 | Rent           | \$15,001 - \$50,000  | <input type="checkbox"/> |
| 2101 39th Street, Sacramento, CA<br><br>LOCATION: Sacramento, CA, US | JT    | \$250,001 - \$500,000 | Rent           | \$15,001 - \$50,000  | <input type="checkbox"/> |
| 2231 36th Street, Sacramento, CA<br><br>LOCATION: Sacramento, CA, US | JT    | \$250,001 - \$500,000 | Rent           | \$15,001 - \$50,000  | <input type="checkbox"/> |
| 2536 39th Street, Sacramento, CA<br><br>LOCATION: Sacramento, CA, US | JT    | \$100,001 - \$250,000 | Rent           | \$5,001 - \$15,000   | <input type="checkbox"/> |
| 2642 43rd Street, Sacramento, CA<br><br>LOCATION: Sacramento, CA, US | JT    | \$100,001 - \$250,000 | Rent           | \$5,001 - \$15,000   | <input type="checkbox"/> |
| 2717 P Street, Sacramento, CA  | JT    | \$250,001 - \$500,000 | Rent           | \$50,001 - \$100,000 | <input type="checkbox"/> |

| Asset                            | Owner | Value of Asset        | Income Type(s) | Income              | Tx. > \$1,000?           |
|----------------------------------|-------|-----------------------|----------------|---------------------|--------------------------|
| LOCATION: Sacramento, CA, US     |       |                       |                |                     |                          |
| 4601 V Street, Sacramento, CA    | JT    | \$250,001 - \$500,000 | Rent           | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Sacramento, CA, US     |       |                       |                |                     |                          |
| 4640 U Street, Sacramento, CA    | JT    | \$250,001 - \$500,000 | Rent           | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Sacramento, CA, US     |       |                       |                |                     |                          |
| 6211 Broadway, Sacramento, CA    | JT    | \$250,001 - \$500,000 | Rent           | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Sacramento, CA, US     |       |                       |                |                     |                          |
| 6337 Rampart, Sacramento, cA     | JT    | \$250,001 - \$500,000 | Rent           | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Sacramento, CA, US     |       |                       |                |                     |                          |
| American Cent Inter              | JT    | \$15,001 - \$50,000   | Dividends      | \$201 - \$1,000     | <input type="checkbox"/> |
| amg yacktman focus               | JT    | \$50,001 - \$100,000  | Dividends      | \$1 - \$200         | <input type="checkbox"/> |
| Baird Core Plus Bond             | JT    | \$15,001 - \$50,000   | Dividends      | \$1 - \$200         | <input type="checkbox"/> |
| BGI US Equity                    | SP    | \$100,001 - \$250,000 | None           |                     | <input type="checkbox"/> |
| BGI US Equity                    | SP    | \$15,001 - \$50,000   | None           |                     | <input type="checkbox"/> |
| Capital Guardian                 | SP    | \$50,001 - \$100,000  | None           |                     | <input type="checkbox"/> |
| Capital Guardian                 | SP    | \$50,001 - \$100,000  | None           |                     | <input type="checkbox"/> |
| EG Shares                        | JT    | \$1,001 - \$15,000    | None           |                     | <input type="checkbox"/> |
| Elk Grove Commerce Bank          | JT    | \$1,001 - \$15,000    | Interest       | \$1 - \$200         | <input type="checkbox"/> |
| First Trust Morningstar Dividend | JT    | \$15,001 - \$50,000   | Dividends      | \$1 - \$200         | <input type="checkbox"/> |

| Asset                          | Owner | Value of Asset       | Income Type(s) | Income            | Tx. > \$1,000?           |
|--------------------------------|-------|----------------------|----------------|-------------------|--------------------------|
| Fixed Income Fund              | SP    | \$50,001 - \$100,000 | None           |                   | <input type="checkbox"/> |
| Golden One Credit Union        | JT    | \$1,001 - \$15,000   | Interest       | \$1 - \$200       | <input type="checkbox"/> |
| Guggenheim                     |       | \$50,001 - \$100,000 | Dividends      | \$201 - \$1,000   | <input type="checkbox"/> |
| Guggenheim ETF                 | JT    | \$15,001 - \$50,000  | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| Harding Loevner Emerging       | JT    | \$1,001 - \$15,000   | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| India Fund                     | JT    | \$1,001 - \$15,000   | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| Invesco Convertable            | JT    | \$15,001 - \$50,000  | Dividends      | \$201 - \$1,000   | <input type="checkbox"/> |
| iShares Core S&P               | JT    | \$15,001 - \$50,000  | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| iShares Core S&P               | JT    | \$50,001 - \$100,000 | Dividends      | \$1,001 - \$2,500 | <input type="checkbox"/> |
| iShares Core S&P               |       | \$15,001 - \$50,000  | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| iShares MSCI CDA               | JT    | \$15,001 - \$50,000  | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| iShares MSCI Growth            | JT    | \$15,001 - \$50,000  | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| iShares MSCI Japan             | JT    | \$1,001 - \$15,000   | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| iShares Nasdaq Biotechnology   | JT    | \$15,001 - \$50,000  | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| iShares S&P 500 Value          | JT    | \$1,001 - \$15,000   | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| iShares S&P Growth             | JT    | \$50,001 - \$100,000 | Dividends      | \$201 - \$1,000   | <input type="checkbox"/> |
| iShares SPDR Industrial Select | JT    | \$1,001 - \$15,000   | Dividends      | \$1 - \$200       | <input type="checkbox"/> |

| Asset                            | Owner | Value of Asset          | Income Type(s) | Income              | Tx. > \$1,000?                      |
|----------------------------------|-------|-------------------------|----------------|---------------------|-------------------------------------|
| iShares TR MSCI EAFE             | JT    | \$15,001 - \$50,000     | Dividends      | \$201 - \$1,000     | <input type="checkbox"/>            |
| Janus Balanced Fund              | JT    | \$50,001 - \$100,000    | Dividends      | \$201 - \$1,000     | <input type="checkbox"/>            |
| Metropolis Investment Total      | JT    | \$15,001 - \$50,000     | Dividends      | \$201 - \$1,000     | <input type="checkbox"/>            |
| Oakmark International Fund Class | JT    | \$15,001 - \$50,000     | Dividends      | \$201 - \$1,000     | <input type="checkbox"/>            |
| Oppenheimer Developing           | JT    | \$15,001 - \$50,000     | Dividends      | \$1 - \$200         | <input type="checkbox"/>            |
| Oppenheimer Global S             | JT    | \$1 - \$1,000           | Dividends      | \$1 - \$200         | <input type="checkbox"/>            |
| Oppenheimer S                    | JT    | \$1,001 - \$15,000      | Dividends      | \$1 - \$200         | <input type="checkbox"/>            |
| Parnassus Core Equity            | JT    | \$15,001 - \$50,000     | Dividends      | \$201 - \$1,000     | <input type="checkbox"/>            |
| Parnassus Core Equity Fund       | JT    | \$50,001 - \$100,000    | Dividends      | \$1 - \$200         | <input type="checkbox"/>            |
| Pimco Total Return               | JT    | \$1 - \$1,000           | Dividends      | \$1 - \$200         | <input type="checkbox"/>            |
| Promissory Note Colonial Mutual  | JT    | \$500,001 - \$1,000,000 | Interest       | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Safe Credit Union                | JT    | \$15,001 - \$50,000     | Interest       | \$1 - \$200         | <input type="checkbox"/>            |
| Schwab                           | JT    | \$1,001 - \$15,000      | Dividends      | \$1 - \$200         | <input type="checkbox"/>            |
| Schwab Checking                  | JT    | \$15,001 - \$50,000     | Dividends      | \$201 - \$1,000     | <input checked="" type="checkbox"/> |
| Scout International Fund         | JT    | \$15,001 - \$50,000     | None           |                     | <input type="checkbox"/>            |
| Scout International Fund         | JT    | \$15,001 - \$50,000     | Dividends      | \$1 - \$200         | <input type="checkbox"/>            |
| Scout Small Cap                  |       | \$15,001 - \$50,000     | Dividends      | \$201 - \$1,000     | <input type="checkbox"/>            |

| Asset                           | Owner | Value of Asset        | Income Type(s)      | Income            | Tx. > \$1,000?           |
|---------------------------------|-------|-----------------------|---------------------|-------------------|--------------------------|
| Sector SPDR Energy Select       |       | \$15,001 - \$50,000   | Dividends           | \$1 - \$200       | <input type="checkbox"/> |
| Sector SPDR Financial           | JT    | \$15,001 - \$50,000   | Dividends           | \$201 - \$1,000   | <input type="checkbox"/> |
| Sector SPDR Industrial Select   | JT    | \$15,001 - \$50,000   | Dividends           | \$201 - \$1,000   | <input type="checkbox"/> |
| Sector SPDR Materials Fund      | JT    | \$1,001 - \$15,000    | Dividends           | \$1 - \$200       | <input type="checkbox"/> |
| Sector SPDR Tech Select         | JT    | \$50,001 - \$100,000  | Dividends           | \$1 - \$200       | <input type="checkbox"/> |
| SPDR S&P International Dividend | JT    | \$1,001 - \$15,000    | Dividends           | \$1 - \$200       | <input type="checkbox"/> |
| SPDR S&P Regional Banking       | JT    | \$15,001 - \$50,000   | Dividends           | \$201 - \$1,000   | <input type="checkbox"/> |
| T Rowe Price Global             |       | \$15,001 - \$50,000   | Dividends           | \$1 - \$200       | <input type="checkbox"/> |
| TPMG Conservative               | SP    | \$50,001 - \$100,000  | None                |                   | <input type="checkbox"/> |
| TPMG Mod                        | SP    | \$50,001 - \$100,000  | None                |                   | <input type="checkbox"/> |
| TPMG Moderate                   | SP    | \$50,001 - \$100,000  | None                |                   | <input type="checkbox"/> |
| UBS Global Asset                | SP    | \$100,001 - \$250,000 | None                |                   | <input type="checkbox"/> |
| Vanguard CA Inter Term          | JT    | \$50,001 - \$100,000  | Dividends           | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Vanguard FTSE Emerging          | JT    | \$15,001 - \$50,000   | Dividends           | \$1 - \$200       | <input type="checkbox"/> |
| Wells Fargo Checking            | JT    | \$50,001 - \$100,000  | Dividends, Interest | \$1 - \$200       | <input type="checkbox"/> |
| Wells Fargo Savings             | JT    | \$15,001 - \$50,000   | Interest            | \$1 - \$200       | <input type="checkbox"/> |

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

| Source                       | Type          | Amount |
|------------------------------|---------------|--------|
| The Permanante Medical Group | Spouse Salary | N/A    |

SCHEDULE D: LIABILITIES

| Owner | Creditor                   | Date Incurred | Type                                | Amount of Liability   |
|-------|----------------------------|---------------|-------------------------------------|-----------------------|
| JT    | Safe Credit Union          | November 2008 | Morgage, Elk Grove, CA              | \$250,001 - \$500,000 |
| JT    | Bank of America            | March 2008    | Mortgage on Rental, Sacramento, CA  | \$100,001 - \$250,000 |
| JT    | Coldwell Banker Home Loans | June 2008     | Mortgage on Rental, Sacramento, CA  | \$100,001 - \$250,000 |
| JT    | Coldwell Banker Home Loans | June 2009     | Mortgage on Rental, Sacramento, CA  | \$100,001 - \$250,000 |
| JT    | Coldwell Banker Home Loans | June 2006     | Mortgage on Rental Property, Sac CA | \$100,001 - \$250,000 |
| JT    | Coldwell Banker Home Loans | June 2008     | Mortgage on Rental Property, Sac CA | \$100,001 - \$250,000 |
| JT    | Evergreen Mortgage         | January 2013  | Mortgage ,Washington DC             | \$250,001 - \$500,000 |
| JT    | Coldwell Banker Home Loans | June 2011     | Mortgage on Rental Property, Sac CA | \$100,001 - \$250,000 |
| JT    | Coldwell Banker Home Loans | November 2009 | Mortgage on Rental, Sacramento, CA  | \$100,001 - \$250,000 |

SCHEDULE E: POSITIONS

| Position                       | Name of Organization    |
|--------------------------------|-------------------------|
| Clinical Professor of Medicine | University of CA, Davis |
| CEO, President                 | Mango Management Inc    |

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?                  |
| Alliance for Health Reform | 02/28/2014 | 03/3/2014 | Washington, DC -<br>Houston, TX -<br>Washington, DC | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

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

None disclosed.

## 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. Ami Bera , 05/15/2015