

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

FORM A  
For use by Members, officers, and employees

HAND  
DELIVERED

Peter Graham Olson  
(Full Name)

281-494-9718  
(Daytime Telephone)

2009 MAY 14 PM 1:58  
(Office Use Only)

LEGISLATIVE RESOURCE CENTER

Filer ☒ Member of the U.S. House of Representatives  
State: TX District: 22

Officer Or Employee

Employing Office:

U.S. House of Representatives

Office of the Clerk  
A \$200 penalty shall be assessed against anyone who files more than 30 days late.

Report Type

☒ Annual (May 15)

☐ Amendment

☐ Termination

Termination Date:

## 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?	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)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
II. If yes, complete and attach Schedule I. 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?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	VII. If yes, complete and attach Schedule VI. 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)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
III. If yes, complete and attach Schedule II. 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?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VIII. If yes, complete and attach Schedule VII. Did you hold any reportable positions on or before the date of filing in the current calendar year?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
IV. If yes, complete and attach Schedule III. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. If yes, complete and attach Schedule VIII. Did you have any reportable agreement or arrangement with an outside entity?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
V. If yes, complete and attach Schedule IV. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?	Yes <input checked="" type="checkbox"/> No <input 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

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 <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 <input type="checkbox"/> No <input checked="" type="checkbox"/>

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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BLOCK A		BLOCK B	BLOCK C	BLOCK D	BLOCK E
Asset and/or Income Source		Year-End Value of Asset	Type of Income	Amount of Income	Transaction
<p>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.</p> <p>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.</p> <p>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.</p>		<p>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."</p>	<p>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.</p>	<p>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.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
DC	Oppenheimer Rising Dividends Fund, Inc. Class A	None	Mutual Fund	\$1,001 - \$2,500	S
DC	Oppenheimer MidCap Fund Class A	None	Mutual Fund	\$201 - \$1,000	S
DC	Oppenheimer Main Street Small Cap Fund Class A	None	Mutual Fund	\$1,001 - \$2,500	S
DC	Threadneedle Global Equity Fund Class A (IGLGX)	\$1,001 - \$15,000	None	NONE	
DC	RVS Dividend Opportunity Fund Class A (INUTX)	\$1,001 - \$15,000	None	NONE	
DC	RVS Mid Cap Value Fund Class A (AMVAX)	\$1,001 - \$15,000	None	NONE	

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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DC	Threadneedle Global Equity Fund Class A (IGLGX)	\$1,001 - \$15,000	None	NONE	
DC	RVS Global Technology Fund Class A (AXIAX)	\$1,001 - \$15,000	None	NONE	
DC	RVS Dividend Opportunity Fund Class A (INUTX)	\$1,001 - \$15,000	None	NONE	
JT	Schwab Adv Cash Reserve (SWQXX)	\$15,001 - \$50,000	None	NONE	
JT	Schwab Value Advantage Money Fund (SWVXX)	\$100,001 - \$250,000	Money Market	\$15,001 - \$50,000	S(part)
JT	Blackrock Latin America (MALTX)	\$1,001 - \$15,000	None	NONE	
JT	Lazard International Small Cap (LZISX)	\$15,001 - \$50,000	Reinvested Shares	\$201 - \$1,000	Other
JT	Morgan Stanley US Real Estate (MUSUX)	\$1,001 - \$15,000	None	NONE	
JT	Royce Premier Fund (RYP1X)	\$1,001 - \$15,000	Mutual Fund	\$1,001 - \$2,500	S(part)
JT	Royce Total Return Fund (RYR1Z)	\$1,001 - \$15,000	Mutual Fund	\$1,001 - \$2,500	S(part)
JT	T Rowe Price International (PRIDX)	\$1,001 - \$15,000	None	NONE	
JT	T Rowe Price New Asia Fund (PRASX)	\$15,001 - \$50,000	Reinvested Shares	\$1,001 - \$2,500	Other
JT	US Global Investment Fund (PSPFX)	\$1,001 - \$15,000	None	NONE	
JT	Vanguard Energy Fund (VGENX)	\$15,001 - \$50,000	Reinvested Shares	\$201 - \$1,000	Other

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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JT	Vanguard Euro Stock Index (VESSX)	\$15,001 - \$50,000	Reinvested Shares	\$1,001 - \$2,500	Other
JT	Ishares MSCI Canada Index Fund (EWC)	\$1,001 - \$15,000	None	NONE	
JT	Ishares MSCI Japan Index Fund (EWJ)	\$1,001 - \$15,000	None	NONE	
JT	Ishares S&P North America Fund (IGE)	\$1,001 - \$15,000	None	NONE	
JT	Ishares TR S&P Small Cap (IJR)	\$15,001 - \$50,000	Mutual Fund	NONE	
JT	SPDR Trust Unit SR 1 (SPY)	\$15,001 - \$50,000	Mutual Fund	\$5,001 - \$15,000	S(part)
JT	Ivy Global Natural Resources (IGNYX)	None	Mutual Fund	\$2,501 - \$5,000	S
JT	Matthews Pacific Tiger Fund (MAPTX)	None	Mutual Fund	\$15,001 - \$50,000	S
JT	Oakmark International Small Cap (OAKEX)	None	Mutual Fund	\$5,001 - \$15,000	S
JT	Fidelity Canada Fund (FICDX)	None	Mutual Fund	\$2,501 - \$5,000	S
JT	Forward Int'l Small Co Fund Inst CL (PTSCX)	None	Mutual Fund	\$5,001 - \$15,000	S
JT	JP Morgan US Real Estate Select (SUIEX)	None	Mutual Fund	\$2,501 - \$5,000	S
JT	Morgan Stanley Inst Int'l Small Cap Fund Class A (MSISX)	None	Mutual Fund	\$5,001 - \$15,000	S
JT	T Rowe Price Japan Fund (PRJPX)	None	Mutual Fund	\$5,001 - \$15,000	S

# SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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JT	T Rowe Price Latin America Fund (PRLAX)	None	Mutual Fund	\$2,501 - \$5,000	S
JT	T Rowe Price New Era Fund (PRNEX)	None	Mutual Fund	\$2,501 - \$5,000	S
JT	Japan Fund Class S (SJPNX)	None	Mutual Fund	\$5,001 - \$15,000	S
JT	JP Morgan US Real Estate Class A (SUSIX)	None	Mutual Fund	\$2,501 - \$5,000	S
JT	DWS Dreman Small Cap Value Class S (KDSSX)	None	Mutual Fund	\$2,501 - \$5,000	S
JT	Managers Small Cap Fund (MSSCX)	None	Mutual Fund	\$5,001 - \$15,000	S
JT	Ishares S&P Small Cap Value Index Fund 600 (IJS)	None	Mutual Fund	\$5,001 - \$15,000	S
SP	Morgan Stanley Inst Int'l Real Estate (MSUAX)	\$1,001 - \$15,000	IRA	NONE	
SP	JP Morgan US Real Estate Class A (SUSIX)	None	IRA	\$5,001 - \$15,000	S
SP	JP Morgan US Real Estate Select (SUIEX)	\$1,001 - \$15,000	IRA	NONE	
	Japan Fund Class S (SJPNX)	None	IRA	\$2,501 - \$5,000	S
	Royce Premier Fund (RYPRX)	None	IRA	\$2,501 - \$5,000	S
	Morgan Stanley Inst Int'l Real Estate (MSUSX)	\$1,001 - \$15,000	IRA	\$2,501 - \$5,000	P
	JP Morgan US Real Estate Class A (SUSIX)	None	IRA	\$2,501 - \$5,000	S

**SCHEDULE III - ASSETS AND "UNEARNED" INCOME**

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	JP Morgan US Real Estate Select (SUIEX)	\$1,001 - \$15,000	IRA	NONE	
	Japan Fund Class S (SJPNX)	None	IRA	\$2,501 - \$5,000	S(part)
	Morgan Stanley Inst Int'l Real Estate (MSUAX)	\$1,001 - \$15,000	IRA	NONE	
	T Rowe Price Japan Fund (PRJPX)	None	IRA	\$2,501 - \$5,000	S
	Morgan Stanley US Real Estate I (MSUSX)	\$1,001 - \$15,000	IRA	NONE	
	Qualified Excepted Trust	Unknown	EXCEPTED TRUST	\$15,001 - \$50,000	Other
JT	Sale of 8203 Strong Spring Court, Annandale, VA	None	CAPITAL GAINS	\$100,001 - \$1,000,000	S
DC	REO Irrevocable Insurance Trust	\$15,001 - \$50,000	EXCEPTED TRUST	NONE	
DC	REO Irrevocable Insurance Trust	\$15,001 - \$50,000	EXCEPTED TRUST	NONE	

# 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, JI	Asset	Type of Transaction	Date	Amount of Transaction
JT	Bank of America	Transfer	4-29-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	12-30-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	11-26-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	10-31-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	9-30-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	8-28-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	7-31-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	5-29-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	3-28-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	2-28-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	2-25-08	\$15,001 - \$50,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
JT	Bank of America	Transfer	1-30-08	\$1,001 - \$15,000
JT	Bank of America	Transfer	6-30-08	\$1,001 - \$15,000
JT	Blackrock Latin America Instl Cl (MALTX)	P	12-24-08	\$1,001 - \$15,000
JT	DWS Dreman Small Cap Value Class S (KDSSX)	S(part)	1-15-08	\$1,001 - \$15,000
JT	DWS Dreman Small Cap Value Class S (KDSSX)	S	6-18-08	\$1,001 - \$15,000
JT	E Trade Bank	Other	9-12-08	\$1,001 - \$15,000
JT	Fidelity Canada Fund (FICDX)	P	6-18-08	\$1,001 - \$15,000
JT	Fidelity Canada Fund (FICDX)	S	12-24-08	\$1,001 - \$15,000
JT	Forward Int'l Small Co Fund Inst CL (PTSCX)	P	6-18-08	\$15,001 - \$50,000
JT	Forward Int'l Small Co Fund Inst CL (PTSCX)	S	12-24-08	\$1,001 - \$15,000
JT	Ishares MSCI Canada Index Fund (EWC)	P	12-29-08	\$1,001 - \$15,000



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SP, DC, JI	Asset	Type of Transaction	Date	Amount of Transaction
JT	Ishares MSCI Japan Index Fund (EWJ)	P	12-29-08	\$1,001 - \$15,000
JT	Ishares S&P North American Fund Natural Resources Index Fund (IGE)	P	12-3-08	\$1,001 - \$15,000
JT	Ishares S&P Small Cap Value Index Fund (IJS)	S(part)	6-20-08	\$1,001 - \$15,000
JT	Ishares TR S&P Small Cap 600 Index Fund (IJR)	S(part)	1-17-08	\$1,001 - \$15,000
JT	Ishares TR S&P Small Cap 600 Index Fund (IJR)	S(part)	6-20-08	\$1,001 - \$15,000
JT	Ivy Global Natural Resources (IGNYX)	S	12-1-08	\$1,001 - \$15,000
JT	Ivy Global Natural Resources (IGNYX)	P	6-18-08	\$1,001 - \$15,000
	Japan Fund Class S (SJPNX)	S	8-28-08	\$1,001 - \$15,000
	Japan Fund Class S (SJPNX)	S(part)	6-18-08	\$1,001 - \$15,000
JT	Japan Fund Class S (SJPNX)	PS	1-15-08	\$1,001 - \$15,000
JT	Japan Fund Class S (SJPNX)	S	8-28-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
JT	JP Morgan Stanley Int'l Small Cap Fund Class A (MSISX)	S	12-24-08	\$1,001 - \$15,000
JT	JP Morgan Stanley US Real Estate I (MSUSX)	P	12-24-08	\$1,001 - \$15,000
JT	JP Morgan US Real Estate Class A (SUSIX)	S	7-25-08	\$1,001 - \$15,000
JT	JP Morgan US Real Estate Class A (SUSIX)	P	6-18-08	\$1,001 - \$15,000
	JP Morgan US Real Estate Class A (SUSIX)	S	7-25-08	\$1,001 - \$15,000
JT	JP Morgan US Real Estate Class A (SUSIX)	S(part)	1-15-08	\$1,001 - \$15,000
JT	JP Morgan US Real Estate Class A (SUSIX)	P	6-19-08	\$1,001 - \$15,000
SP	JP Morgan US Real Estate Class A (SUSIX)	S	7-25-08	\$1,001 - \$15,000
JT	JP Morgan US Real Estate Select (SUIEX)	S	12-24-08	\$1,001 - \$15,000
JT	JP Morgan US Real Estate Select (SUIEX)	P	7-25-08	\$1,001 - \$15,000
SP	JP Morgan US Real Estate Select (SUIEX)	P	7-25-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
JT	Lazard International Small Cap (LZISX)	P	12-17-08	\$1,001 - \$15,000
JT	Lazard International Small Cap (LZISX)	P	12-24-08	\$1,001 - \$15,000
JT	Managers Small Cap Fund (MSSCX)	S	6-18-08	\$1,001 - \$15,000
JT	Matthews Pacific Tiger Fund (MAPTX)	S	12-9-08	\$15,001 - \$50,000
JT	Matthews Pacific Tiger Fund (MAPTX)	P	6-18-08	\$15,001 - \$50,000
	Morgan Stanley Inst Int'l Real Estate (MSUAX)	P	6-18-08	\$1,001 - \$15,000
JT	Morgan Stanley Inst Int'l Small Cap Fund Class A (MSISX)	S	12-24-08	\$1,001 - \$15,000
	Morgan Stanley US Real Estate I (MSUSX)	P	12-26-08	\$1,001 - \$15,000
JT	Oakmark International Small Cap (OAKEX)	S	12-17-08	\$1,001 - \$15,000
JT	Oakmark International Small Cap (OAKEX)	P	6-18-08	\$15,001 - \$50,000
DC	Oppenheimer Main Street Small Cap Fund Class A	S	1-9-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
DC	Oppenheimer MidCap Fund Class A	S	1-9-08	< \$1,000
DC	Oppenheimer Rising Dividends Fund, Inc. Class A	S	1-9-08	\$1,001 - \$15,000
	Qualified Excepted Trust	Transfer	9-2-08	\$1,001 - \$15,000
	Qualified Excepted Trust	Transfer	7-28-08	\$15,001 - \$50,000
	Qualified Excepted Trust	Transfer	4-24-08	\$1,001 - \$15,000
JT	Royce Premier Fund (RYP1X)	S(part)	12-24-08	\$1,001 - \$15,000
JT	Royce Premier Fund (RYP1X)	S(part)	6-18-08	\$1,001 - \$15,000
	Royce Premier Fund (RYPRX)	S	6-18-08	\$1,001 - \$15,000
JT	Royce Total Return Fund (RYR1Z)	S(part)	6-18-08	\$1,001 - \$15,000
JT	Royce Total Return Fund (RYR1Z)	S(part)	1-15-08	\$1,001 - \$15,000
JT	Royce Total Return Fund (RYR1Z)	S(part)	12-24-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
JT	Sale of 8203 Strong Spring Court, Annandale, VA	S	12-19-08	\$250,001 - \$500,000
JT	Schwab Adv Cash Reserve	S(part)	9-12-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	2-29-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	3-31-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	4-30-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	Other	5-12-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	5-30-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	P	6-20-08	\$15,001 - \$50,000
JT	Schwab Adv Cash Reserve	S(part)	6-30-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	7-31-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	P	2-26-08	\$15,001 - \$50,000

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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
JT	Schwab Adv Cash Reserve	S(part)	8-29-08	\$15,001 - \$50,000
JT	Schwab Adv Cash Reserve	S(part)	6-18-08	\$1,000
JT	Schwab Adv Cash Reserve	S(part)	9-30-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	10-31-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	11-28-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	P	12-1-08	\$15,001 - \$50,000
JT	Schwab Adv Cash Reserve	S(part)	12-3-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	P	12-24-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	12-26-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	12-29-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	12-31-08	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
JT	Schwab Adv Cash Reserve	P	8-28-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	1-18-08	\$100,001 - \$250,000
JT	Schwab Adv Cash Reserve	P	1-17-08	\$100,001 - \$250,000
JT	Schwab Adv Cash Reserve	S(part)	1-16-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	P	1-15-08	\$50,001 - \$100,000
JT	Schwab Adv Cash Reserve	S(part)	6-25-08	\$1,001 - \$15,000
JT	Schwab Adv Cash Reserve	S(part)	1-31-08	\$1,001 - \$15,000
JT	Schwab One Check	Other	6-25-08	\$1,001 - \$15,000
JT	Schwab One Check	Other	6-18-08	\$1,000
JT	Schwab One Check	Other	5-12-08	\$1,001 - \$15,000
JT	Schwab Value Advantage Money Fund (SWVXX)	S(part)	2-26-08	\$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, JI	Asset	Type of Transaction	Date	Amount of Transaction
JT	Schwab Value Advantage Money Fund (SWVXX)	P	1-18-08	\$100,001 - \$250,000
JT	Schwab Value Advantage Money Fund (SWVXX)	S(part)	11-5-08	\$1,001 - \$15,000
JT	Schwab Value Advantage Money Fund (SWVXX)	S(part)	12-1-08	\$15,001 - \$50,000
JT	Schwab Value Advantage Money Fund (SWVXX)	S(part)	6-18-08	\$15,001 - \$50,000
JT	SPDR Trust Unit SR 1 (SPY)	S(part)	1-17-08	\$100,001 - \$250,000
JT	SPDR Trust Unit SR 1 (SPY)	S(part)	6-20-08	\$15,001 - \$50,000
JT	SPDR Trust Unit SR 1 (SPY)	Other	1-31-08	\$1,001 - \$15,000
JT	SPDR Trust Unit SR 1 (SPY)	S(part)	12-29-08	\$1,001 - \$15,000
JT	T Rowe Price Int'l Discovery Fund (PRIDX)	P	12-24-08	\$1,001 - \$15,000
	T Rowe Price Japan Fund (PRJJPX)	P	8-29-08	\$1,001 - \$15,000
JT	T Rowe Price Japan Fund (PRJJPX)	S	12-24-08	\$1,001 - \$15,000



# SCHEDULE IV - TRANSACTIONS

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SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
JT	T Rowe Price Japan Fund (PRJPX)	S	12-24-08	\$1,001 - \$15,000
JT	T Rowe Price Japan Fund (PRJPX)	P	8-29-08	\$1,001 - \$15,000
JT	T Rowe Price Latin America Fund (PRLAX)	P	6-18-08	\$1,001 - \$15,000
JT	T Rowe Price Latin America Fund (PRLAX)	S	12-24-08	\$1,001 - \$15,000
JT	T Rowe Price New Asia Fund (PRASX)	P	6-18-08	\$15,001 - \$50,000
JT	T Rowe Price New Asia Fund (PRASX)	P	12-9-08	\$15,001 - \$50,000
JT	T Rowe Price New Asia Fund (PRASX)	S(part)	1-15-08	\$1,001 - \$15,000
JT	T Rowe Price New Era Fund (PRNEX)	S	12-24-08	\$1,001 - \$15,000
JT	T Rowe Price New Era Fund (PRNEX)	P	6-18-08	\$1,001 - \$15,000
JT	US Global Inv Global Resources Fund (PSPFX)	P	12-24-08	\$1,001 - \$15,000
JT	Vanguard Energy Fund (VGENX)	S(part)	1-15-08	\$15,001 - \$50,000

# SCHEDULE IV - TRANSACTIONS

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SP, DC, JI	Asset	Type of Transaction	Date	Amount of Transaction
JT	Vanguard Energy Fund (VGENX)	S(part)	6-18-08	\$1,001 - \$15,000
JT	Vanguard Energy Fund (VGENX)	P	12-24-08	\$1,001 - \$15,000
JT	Vanguard European Stock Index (VESSX)	S(part)	1-15-08	\$15,001 - \$50,000
JT	Vanguard European Stock Index (VESSX)	S(part)	6-18-08	\$50,001 - \$100,000
JT	Vanguard European Stock Index (VESSX)	Other	12-23-08	\$1,001 - \$15,000
JT	Vanguard European Stock Index (VESSX)	P	12-26-08	\$1,001 - \$15,000

# SCHEDULE V - LIABILITIES

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or dependent child. Mark the highest amount owed during the year. Exclude: Any mortgage on your personal residence (unless all or part of it is rented out); loans secured by automobiles, household furniture, or appliances; and liabilities owed to a spouse, or the child, parent, or sibling of you or your spouse. Report "revolving charge accounts" (i.e., credit cards) only if the balance at the close of the preceding calendar year exceeded \$10,000.

SP, DC, JT	Creditor	Type of Liability	Amount of Liability
JT	Chase Home Finance	Mortgage on 4018 Weatherfield Court, Sugar Land, TX 77479	\$250,001 - \$500,000
JT	Wells Fargo	Mortgage on 8203 Strong Spring Court, Annandale, VA 22003	\$100,001 - \$250,000