



Filing ID #10002351

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Peter O. Anderson
Status: Congressional Candidate
State/District: CA39

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2014
Filing Date: 10/4/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|--------------------------|----------------|-------------------------------|-----------------------|
| Ameriprise ⇒ Active Diversified Portfolio | SP | \$50,001 - \$100,000 | Dividends | \$1,001 - \$2,500 | \$1,001 - \$2,500 |
| Ameriprise ⇒ RiverSource Retirement Advisor Advantage Variable Annuity | SP | \$100,001 - \$250,000 | None | | |
| Bank of America Checking | | \$1,001 - \$15,000 | None | | |
| Boeing | | Undetermined | Pension | \$2,501 - \$5,000 | \$2,501 - \$5,000 |
| DNB (Norway) Insurance Annuity | SP | \$50,001 - \$100,000 | None | | |
| DNB (Norway) Mutual Fund | SP | \$50,001 - \$100,000 | Interest | \$1,001 - \$2,500 | \$1,001 - \$2,500 |
| DNB (Norway) Savings | SP | \$15,001 - \$50,000 | Interest | \$1,001 - \$2,500 | \$1,001 - \$2,500 |
| Fidelity ⇒ | SP | \$50,001 - | None | | |

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|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Asset Manager 50% | | \$100,000 | | | |
| HP/EDS | | Undetermined | Pension | \$5,001 - \$15,000 | \$5,001 - \$15,000 |
| New York Life | | \$50,001 - \$100,000 | Fixed Annuity | \$5,001 - \$15,000 | \$5,001 - \$15,000 |
| Regents of UC | SP | Undetermined | Pension | \$15,001 - \$50,000 | \$15,001 - \$50,000 |
| Schools First FCU Checking | SP | \$1 - \$1,000 | None | | |
| Schools First FCU Savings | SP | \$100,001 - \$250,000 | Interest | \$201 - \$1,000 | \$201 - \$1,000 |
| Siemens Savings Plan ⇒ LifeCycle Retirement Fund | | \$15,001 - \$50,000 | Required Distribution | \$201 - \$1,000 | \$201 - \$1,000 |
| Storebrand (Norway) | SP | Undetermined | Annuity | \$201 - \$1,000 | \$201 - \$1,000 |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Annuities ⇒ CREF 4109665-2 | SP | \$1,001 - \$15,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Annuities ⇒ CREF 4432971-2 | SP | \$1,001 - \$15,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Annuities ⇒ CREF H01613D-2 | SP | \$1,001 - \$15,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Annuities ⇒ CREF H534601-3 | SP | \$1,001 - \$15,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Annuities ⇒ CREF M092598-4 | SP | \$100,001 - \$250,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Annuities ⇒ TIAA 3432971-4 | SP | \$100,001 - \$250,000 | None | | |

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|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Annuities ⇒ TIAA F534601-7 | SP | \$1,001 - \$15,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Annuities ⇒ TIAA L092598-6 | SP | \$50,001 - \$100,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Other Investments ⇒ AF EuroPacific Growth R5 | SP | \$15,001 - \$50,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Other Investments ⇒ DFA Emerg Mark CorEqPortl | SP | \$15,001 - \$50,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Other Investments ⇒ MFS Value Fund Class R4 | SP | \$1,001 - \$15,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Other Investments ⇒ PIMCO Total Return Instl | SP | \$1,001 - \$15,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Other Investments ⇒ T-C Lifecycle 2015-Rtmt | SP | \$50,001 - \$100,000 | None | | |
| TIAA-CREF Retirement Fund ⇒ TIAA-CREF Other Investments ⇒ T-C S&P 500 Idx-Rtmt | SP | \$15,001 - \$50,000 | None | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ FID Contrafund K | SP | \$50,001 - \$100,000 | None | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ FID Equity Income K | SP | \$1,001 - \$15,000 | None | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ FID Growth & Inc K | SP | \$1,001 - \$15,000 | None | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ | SP | \$50,001 - \$100,000 | None | | |

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|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| FID Overseas K | | | | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ UC Bond Fund | SP | \$50,001 - \$100,000 | None | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ UC Equity Fund | SP | \$100,001 - \$250,000 | None | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ UC Intl Eq Index | SP | \$15,001 - \$50,000 | None | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ UC Pathway Income | SP | \$50,001 - \$100,000 | None | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ UC Savings Fund | SP | \$100,001 - \$250,000 | None | | |
| UC Retirement Savings Program ⇒ UC 403(b) Plan ⇒ Vang Reit Idx Inst | SP | \$15,001 - \$50,000 | None | | |
| UC Retirement Savings Program ⇒ UC DCP ⇒ FID Equity Income K | SP | \$1,001 - \$15,000 | None | | |
| UC Retirement Savings Program ⇒ UC DCP ⇒ UC Savings Fund | SP | \$15,001 - \$50,000 | None | | |
| Vanguard Rollover IRA ⇒ LifeStrategy Conservative Growth Fund | | \$100,001 - \$250,000 | None | | |
| Vanguard Rollover IRA ⇒ Prime Money Market Fund | | \$50,001 - \$100,000 | Required Distribution | None | \$5,001 - \$15,000 |
| Vanguard Traditional IRA ⇒ Prime Money Market Fund | | \$15,001 - \$50,000 | None | | |

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

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Ameriprise (Owner: SP)
- Fidelity (Owner: SP)
- Siemens Savings Plan
- TIAA-CREF Retirement Fund (Owner: SP)
- TIAA-CREF Retirement Fund ⇒ TIAA-CREF Annuities (Owner: SP)
- TIAA-CREF Retirement Fund ⇒ TIAA-CREF Other Investments (Owner: SP)
- UC Retirement Savings Program (Owner: SP)
- UC Retirement Savings Program ⇒ UC 403(b) Plan (Owner: SP)
- UC Retirement Savings Program ⇒ UC DCP (Owner: SP)
- Vanguard Rollover IRA
- Vanguard Traditional IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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

COMMENTS

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: Peter O. Anderson , 10/4/2014