



Filing ID #10009694

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Roger Petersen
Status: Congressional Candidate
State/District: CA11

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2016
Filing Date: 05/26/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America Checking & Savings Accts	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Bank of the Cascades	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Charles Schwab	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Schwab IRA	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab IRA		\$500,001 - \$1,000,000	Interest	\$1 - \$200	\$1 - \$200

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Marsh & McLennan Pension Plan	Monthly Pension	\$12,207.00	\$5,086.00
IRA distribution	Mandatory Annual IRA	N/A	\$26,387.00

Source	Type	Amount Current Year to Filing	Amount Preceding Year
	Distribution		

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.

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

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: Roger Petersen , 05/26/2016