

# FINANCIAL DISCLOSURE REPORT

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#### FILER INFORMATION

Name: Pam Byrnes

**Status:** Congressional Candidate

**State/District:** MI07

#### FILING INFORMATION

Filing Type: Candidate Report

Filing Year: 2014

**Filing Date:** 05/14/2014

# SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset     | Income<br>Type(s) | Income<br>Current Year to<br>Filing | Income<br>Preceding<br>Year |
|--|-------|--------------------|-------------------|-------------------------------------|-----------------------------|
| Capital One Share Builder ⇒ Applied Materials, Inc. (AMAT)         | JT    | \$1,001 - \$15,000 | Dividends         | \$1 - \$200                         | \$1 - \$200                 |
| Capital One Share Builder ⇒ Covidien plc. Ordinary Shares (COV)    | JT    | \$1,001 - \$15,000 | Dividends         | \$1 - \$200                         | \$1 - \$200                 |
| Capital One Share Builder ⇒ Ford Motor Company (F)                 | JT    | \$1,001 - \$15,000 | Dividends         | \$1 - \$200                         | \$1 - \$200                 |
| Capital One Share Builder ⇒ General Electric Company (GE)          | JT    | \$1,001 - \$15,000 | Dividends         | \$1 - \$200                         | \$1 - \$200                 |
| Capital One Share Builder ⇒ HollyFrontier Corporation (HFC)        | JT    | \$1,001 - \$15,000 | Dividends         | \$1 - \$200                         | \$1 - \$200                 |
| Capital One Share Builder ⇒ Mallinckrodt plc Ordinary Shares (MNK) | JT    | \$1 - \$1,000      | Dividends         | \$1 - \$200                         | \$1 - \$200                 |
| Capital One Share Builder ⇒ QUALCOMM Incorporated (QCOM)           | JT    | \$1,001 - \$15,000 | Dividends         | \$1 - \$200                         | \$1 - \$200                 |
| Capital One Share Builder ⇒  | JT    | \$1,001 - \$15,000 | Dividends         | \$1 - \$200                         | \$1 - \$200                 |

|   |                     | Type(s)      | Current Year to<br>Filing | Income<br>Preceding<br>Year |
|---|---------------------|--------------|---------------------------|-----------------------------|
| Walt Disney Company (DIS)   |                     |              |                           |                             |
| Ford Interest Advantage JT  | \$1,001 - \$15,000  | Interest     | None                      | \$1 - \$200                 |
| Raymond James IRA $\Rightarrow$ Apple Inc. (AAPL)                       | \$1,001 - \$15,000  | Tax-Deferred | None                      | None                        |
| Raymond James IRA ⇒ Bank of America Corporation (BAC)                   | \$1,001 - \$15,000  | Tax-Deferred | None                      | None                        |
| Raymond James IRA ⇒ Capital Income Builder American Funds               | \$15,001 - \$50,000 | Tax-Deferred | None                      | None                        |
| Raymond James IRA ⇒ Capital World G&I American Funds                    | \$15,001 - \$50,000 | Tax-Deferred | None                      | None                        |
| Raymond James IRA ⇒ Cinemark Holdings Inc Cinemark Holdings, Inc. (CNK) | \$1,001 - \$15,000  | Tax-Deferred | None                      | None                        |
| Raymond James IRA ⇒ CWMBS INC 2005-9 A-4 Description: Part of IRA       | \$1,001 - \$15,000  | Tax-Deferred | None                      | None                        |
| Raymond James IRA ⇒ Davis New York Venture Fund                         | \$15,001 - \$50,000 | Tax-Deferred | None                      | None                        |
| Raymond James IRA ⇒ Digital Realty Trust                                | \$1,001 - \$15,000  | Tax-Deferred | None                      | None                        |
| Raymond James IRA $\Rightarrow$ SP Dolby Laboratories (DLB)             | \$1,001 - \$15,000  | Tax-Deferred | None                      | None                        |
| Raymond James IRA $\Rightarrow$ SP<br>Europacific Growth Fund           | \$1,001 - \$15,000  | Tax-Deferred | None                      | None                        |
| Raymond James IRA $\Rightarrow$ SP<br>Federated Clover Value Fund       | \$1,001 - \$15,000  | Tax-Deferred | None                      | None                        |
| Raymond James IRA $\Rightarrow$ SP<br>Federated Equity Income Fund      | \$1,001 - \$15,000  | Tax-Deferred | None                      | None                        |
| Raymond James IRA ⇒<br>Gabelli Value Fund                               | \$15,001 - \$50,000 | Tax-Deferred | None                      | None                        |

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|---|-------|---------------------|-------------------|-------------------------------------|-----------------------------|
| Raymond James IRA ⇒ General Electric Company (GE)                 |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA $\Rightarrow$ Income Fund of America            |       | \$15,001 - \$50,000 | Tax-Deferred      | None                                | None                        |
| Raymond James IRA $\Rightarrow$ Invesco Charter Fund              |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA $\Rightarrow$ Iridium Communications Inc (IRDM) |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA ⇒ MESP Location: MI                             |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA ⇒ MESP Location: MI                             |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA $\Rightarrow$ MFS Diversified Income Fund       |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA ⇒ Micron Technology, Inc. (MU)                  | SP    | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA ⇒ RJ Bank Deposit                               |       | \$1 - \$1,000       | Tax-Deferred      | None                                | None                        |
| Raymond James IRA ⇒ RMBS 2003-QSI A-8 DESCRIPTION: Part of IRA    |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA $\Rightarrow$ Southwest Airlines Company (LUV)  | SP    | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA ⇒ TCF Bank Annuity                              |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA ⇒ United Parcel Service, Inc. (UPS)             |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Raymond James IRA ⇒ USAA Aggressive Growth                        |       | \$1,001 - \$15,000  | Dividends         | \$1 - \$200                         | \$1 - \$200                 |

| Asset  | Owner | Value of Asset           | Income<br>Type(s) | Income<br>Current Year to<br>Filing | Income<br>Preceding<br>Year |
|--|-------|--------------------------|-------------------|-------------------------------------|-----------------------------|
| Raymond James IRA ⇒ Vectren Corporation (VVC)                                | SP    | \$1,001 - \$15,000       | Tax-Deferred      | None                                | None                        |
| Raymond James IRA ⇒<br>Wells Fargo Annuity                                   |       | \$50,001 -<br>\$100,000  | Tax-Deferred      | None                                | None                        |
| Rental Home, Draper, Ypsilanti, MI  DESCRIPTION: Rental property.            | JT    | \$100,001 -<br>\$250,000 | Rent              | \$5,001 - \$15,000                  | \$5,001 -<br>\$15,000       |
| Rental Home, Fountain, Ann Arbor, mI  Description: Rental property           | JT    | \$100,001 -<br>\$250,000 | Rent              | \$2,501 - \$5,000                   | \$15,001 -<br>\$50,000      |
| Rental Home, Grant, Ypsilanti, MI  Description: Rental property              | JT    | \$100,001 -<br>\$250,000 | Rent              | \$5,001 - \$15,000                  | \$15,001 -<br>\$50,000      |
| Rental Home, Grove, Ypsilanti, MI  Description: Rental property              | JT    | \$50,001 -<br>\$100,000  | Rent              | \$5,001 - \$15,000                  | \$5,001 -<br>\$15,000       |
| Rental Home, N. Territorial, Dexter Twship, MI  DESCRIPTION: Rental property | JT    | \$100,001 -<br>\$250,000 | Rent              | \$5,001 - \$15,000                  | \$15,001 -<br>\$50,000      |
| Rental Property, Dexter, MI  Description: Rental property                    | JT    | \$250,001 -<br>\$500,000 | Rent              | \$15,001 - \$50,000                 | \$15,001 -<br>\$50,000      |
| State of Michigan ING 401K ⇒ American Fund EuroPacific Growth Fund           |       | \$1 - \$1,000            | Tax-Deferred      | None                                | None                        |
| State of Michigan ING 401K ⇒ ING Small Cap Growth Equity                     |       | \$15,001 - \$50,000      | Tax-Deferred      | None                                | None                        |
| State of Michigan ING 401K ⇒ Oak Mark Equity Fund                            |       | \$1 - \$1,000            | Tax-Deferred      | None                                | None                        |
| State of Michigan ING 401K ⇒ Pimco Total Return                              |       | \$1 - \$1,000            | Tax-Deferred      | None                                | None                        |
| State of Michigan ING 401K ⇒   |       | \$15,001 - \$50,000      | Tax-Deferred      | None                                | None                        |

| Asset  | Owner | Value of Asset      | Income<br>Type(s) | Income<br>Current Year to<br>Filing | Income<br>Preceding<br>Year |
|--|-------|---------------------|-------------------|-------------------------------------|-----------------------------|
| Ridgeworth Funds                                   |       |                     |                   |                                     |                             |
| State of Michigan ING 401K ⇒ SSqA S&P 500 Index    |       | \$15,001 - \$50,000 | Tax-Deferred      | None                                | None                        |
| State of Michigan ING 401K ⇒ SSqA S&P MidCap Index |       | \$15,001 - \$50,000 | Tax-Deferred      | None                                | None                        |
| State of Michigan ING 401K ⇒ Stable Value Fund     |       | \$1,001 - \$15,000  | Tax-Deferred      | None                                | None                        |
| Sun Life Financial Inc. (SLF)                      | SP    | \$1,001 - \$15,000  | Dividends         | \$1 - \$200                         | \$201 - \$1,000             |

<sup>\*</sup> Asset class details available at the bottom of this form.

## SCHEDULE C: EARNED INCOME

| Source                 | Туре              | Amount<br>Current Year to<br>Filing | Amount<br>Preceding Year |
|------------------------|-------------------|-------------------------------------|--------------------------|
| Office Express         | Spouse Salary     | N/A                                 | N/A                      |
| Ann Arbor Office Works | Spouse Commission | N/A                                 | N/A                      |

# SCHEDULE D: LIABILITIES

| Owner | Creditor                      | Date Incurred  | Туре  | Amount of<br>Liability   |
|-------|-------------------------------|----------------|---|--------------------------|
| JT    | United Bank & Trust           | June 2003      | Mortgage on North Territorial, Dexter<br>Township, MI | \$100,001 -<br>\$250,000 |
| JT    | United Bank & Trust           | April 2013     | Commercial note on Ann Arbor Street,<br>Dexter, MI    | \$100,001 -<br>\$250,000 |
| JT    | United Bank & Trust           | July 2012      | Mortgage on Drape Street, Ypsilanti, MI               | \$50,001 -<br>\$100,000  |
| JT    | United Bank & Trust, Michigan | June 2012      | Mortgage on Grove Road, Ypsilanti, MI                 | \$15,001 - \$50,000      |
| JT    | United Bank & Trust, Michigan | June 2012      | Mortgage on Fountain Street, Ann Arbor, MI            | \$50,001 -<br>\$100,000  |
| JT    | United Bank & Trust, Michigan | September 2012 | Mortgage on Grant Street, Ypsilanti, MI               | \$50,001 -<br>\$100,000  |
| JT    | CitiBank                      | September 2013 | Credit Card   | \$10,000 - \$15,000      |

| Owner | Creditor        | Date Incurred | Туре        | Amount of<br>Liability |
|-------|-----------------|---------------|-------------|------------------------|
| SP    | Bank of America | June 2013     | Credit Card | \$15,001 - \$50,000    |
| JT    | Bank of America | January 2014  | Credit Card | \$15,001 - \$50,000    |

#### **SCHEDULE E: POSITIONS**

| Position | Name of Organization     |
|----------|--------------------------|
| Director | Pamela Byrnes Foundation |

#### SCHEDULE F: AGREEMENTS

| Date | Parties To                 | Terms of Agreement                        |
|------|----------------------------|---|
| 2010 | Self and State of Michigan | Legislative Retirement System Health Care |

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

None disclosed.

#### SCHEDULE A ASSET CLASS DETAILS

• Capital One Share Builder (Owner: JT)

o Raymond James IRA

• Raymond James IRA (Owner: SP)

• State of Michigan ING 401K

### 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: Pam Byrnes, 05/14/2014