

UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2009 FINANCIAL DISCLOSURE STATEMENT

FORM A
For use by Members, officers, and employees

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LEONARD LANCE

(Full Name)

732-248-4178

(Daytime Telephone)

Filer Status: ☒ Member of the U.S. House of Representatives

State: NJ District: 07

☐ Officer Or Employee

Employing Office:

Report Type: ☒ Annual (May 15)

☐ Amendment

☐ Termination

Termination Date:

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

Office Use Only

2010 JUN 17 PM 3:58

HAND DELIVERED

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? If yes, complete and attach Schedule I.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$35 and not otherwise exempt)? If yes, complete and attach Schedule VI.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
II. 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? If yes, complete and attach Schedule II.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	VII. 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)? If yes, complete and attach Schedule VII.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
III. 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? If yes, complete and attach Schedule III.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year? If yes, complete and attach Schedule VIII.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
IV. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period? If yes, complete and attach Schedule IV.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule IX.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period? If yes, complete and attach Schedule V.	Yes <input type="checkbox"/> No <input checked="" 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 I - EARNED INCOME

Name LEONARD LANCE

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$200 or more during the preceding calendar year. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000.

Source	Type	Amount
State of NJ	Legislative Pension	\$21,187

SCHEDULE II - PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Name

List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of an honorarium. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Standards of Official Conduct. A green envelope for transmitting the list is included in each Member's filing package. Employees may request a green envelope from the Clerk or use a plain envelope that is appropriately labeled.

Source	Activity	Date	Amount

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name LEONARD LANCE

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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>
JT	Bank of America	\$1 - \$1,000	INTEREST	\$1 - \$200	
	Bank of America MMA	\$50,001 - \$100,000	INTEREST	\$1,001 - \$2,500	
	Bank to America Common Stock (BAC)	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	
SP	Fidelity Investments	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	JP Morgan Retirement Plan	\$250,001 - \$500,000	INTEREST	\$15,001 - \$50,000	
SP	JP Morgan Chase 401k	\$500,001 - \$1,000,000	DIVIDENDS/Capital Gains	\$50,001 - \$100,000	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

		Name LEONARD LANCE		Page 4 of 6	
SP	Vanguard IRA	\$50,001 - \$100,000	DIVIDENDS	\$15,001 - \$50,000	
	Scottrade MMA	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	
	UBS Financial Services	\$500,001 - \$1,000,000	DIVIDENDS	\$5,001 - \$15,000	PS(part)
	Vanguard IRA	\$100,001 - \$250,000	DIVIDENDS	\$15,001 - \$50,000	
	Bank of America Checking	\$1,001 - \$15,000	None	NONE	
	Office Building- 36 Center St Clinton NJ - 50% ownership	\$100,001 - \$250,000	None	NONE	
	Estate of Mae Anderson	\$50,001 - \$100,000	None	NONE	
	Estate of Wesley Lance	\$15,001 - \$50,000	None	NONE	

SCHEDULE IV - TRANSACTIONS

Name LEONARD LANCE

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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	Capital Gain In Excess of \$200?	Date	Amount of Transaction
	UBS Financial Services - Capital Loss	S(part)	No	12/29/09	\$0

SCHEDULE V - LIABILITIES

Name

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

SCHEDULE VI - GIFTS

Name

Report the source, a brief description, and the value of all gifts totaling more than \$335 received by you, your spouse, or a dependent child from any source during the year. Exclude: Gifts from relatives, gifts of personal hospitality of an individual, local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$134 or less need not be added towards the \$335 disclosure threshold. Note: The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule.

Source	Description	Value

SCHEDULE VII - TRAVEL PAYMENTS AND REIMBURSEMENTS

Name **LEONARD LANCE**

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Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$335 received by you, your spouse, or a dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense, and the amount of time, if any, that was not at the sponsor's expense. Disclosure is required regardless of whether the expenses were reimbursed or paid directly by the sponsor. Exclude: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to you.

Source	Date(s)	Point of Departure-- Destination--Point of Return	Lodging? (Y/N)	Food? (Y/N)	Was a Family Member Included? (Y/N)	Days not at sponsor's expense
American Israel Education Fund	8/1/09- 8/9/09	EW/R-Tel Aviv, Israel-EW/R	Y	Y	Y	None

SCHEDULE VIII - POSITIONS

Name

Report all positions, compensated or uncompensated, held during the current calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or any business enterprise, any nonprofit organization, any labor organization, or any educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities; positions solely of an honorary nature; and positions listed on Schedule I.

Position	Name of Organization

SCHEDULE IX - AGREEMENTS

Name

Identify the date, parties to, and general terms of any agreement or arrangement with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. Government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties To	Terms of Agreement

Hon. Leonard Lance - NJ-07
Statement of Underlying Assets
Calendar Year 2009 Financial Disclosure Statement

Candidate - UBS Financial Services - Underlying Assets

Asset Range

American Funds Euro Pacific Growth	\$50,001-\$100,000
FT Templeton Foreign Sm Co A	\$15,001-\$50,000
FT Templeton Global Bond	\$15,001-\$50,000
Ivy Global Natural Resources Fund	\$15,001-\$50,000
JP Morgan Mid Cap Value	\$15,001-\$50,000
Oppenheimer Developing Markets	\$15,001-\$50,000
UBS Pace Intl Emerging Markets	\$1,001-\$15,000
Alliance Bernstein Growth Fund of America	\$50,001-\$100,000
American Funds Growth Fund of America	\$15,001-\$50,000
American Funds Fundamental Investors	\$50,001-\$100,000
American Funds Washington Mutual Investors	\$15,001-\$50,000
Van Kampen Mid Growth Fund	\$15,001-\$50,000
Keeley Small Cap Value Fund	\$15,001-\$50,000
Eton Vance Large Cap Value Fund Class A	\$15,001-\$50,000

Candidate - Vanguard IRA

Asset Range

Capital Opportunity Investment	\$15,001-\$50,000
Emerging Markets Stock Index	\$1,001-\$15,000
Energy Fund Admiral	\$50,001-\$100,000
Precious Metals and Mining	\$15,001-\$50,000
Primecap Fund Investor	\$1,001-\$15,000
Windsor II Fund Investment	\$1,001-\$15,000

Spouse - JP MorganChase 401(k)

Asset Range

JP Morgan Chase Common Stock	\$250,001-\$500,000
JPMC ST Fixed Income Fund	\$100,001-\$250,000
JPMC Stable Value Fund	\$50,001-\$100,000
JPMC Growth and Income Fund	\$50,001-\$100,000
JPMC S&P 500 Index Fund	\$50,001-\$100,000
JPMC Small Cap Core Fund	\$50,001-\$100,000
JPMC Intl Large Cap Core Fund	\$15,001-\$50,000

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Statement of Underlying Assets - Page 2
Calendar Year 2009 Financial Disclosure Statement

<u>Candidate - Estate of Wesley L. Lance</u>	Candidate Share Asset Range
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Candidate has 50% share in all underlying assets still undistributed at this time

MetLife Inc Stock	\$1-\$1,000
Bank of America Stock	\$15,001-\$50,000
CortS Trust for First Union Intl Capital I	\$1,001-\$15,000

<u>Candidate - Estate of Mae Anderson</u>	Candidate Share Asset Range
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Candidate has 50% share in all underlying assets still undistributed at this time, less fees dues Executor.
Candidate is not the executor nor administrator.

Scudder Mutual Fund	\$1,001-\$15,000
Dreyfus Mutual Fund	\$1,001-\$15,000
Putnam Mutual Fund	\$1,001-\$15,000
Nuveen Mutual Fund	\$1,001-\$15,000
ATT Common Stock	\$15,001-\$50,000
Comcast Common Stock	\$1,001-\$15,000
Qwest Common Stock	\$1-\$1,000
Verizon Common Stock	\$1,001-\$15,000
Vodaphone Common Stock	\$1,001-\$15,000
Xcel Common Stock	\$1,001-\$15,000
Fairpoint Communications	\$1-\$1,000