



Filing ID #10011103

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Dr. Steve Wesley Isakson  
**Status:** Congressional Candidate  
**State/District:** CA24

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2016  
**Filing Date:** 05/7/2016

## 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 I	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Bank of America Checking II	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Cerner Corporation Foundation Retirement Plan 401k ⇒ Cerner Corporation (CERN)	SP	\$1,001 - \$15,000	Tax-Deferred		
Cerner Corporation Foundation Retirement Plan 401k ⇒ TRP Retirement 2010	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Bank Checking Judith	SP	\$1,001 - \$15,000	Interest, Bonus	\$201 - \$1,000	None
Chase Bank Checking Steve		\$1,001 - \$15,000	Interest, Bonus	\$201 - \$1,000	None
Chase Bank Savings Judith	SP	\$15,001 - \$50,000	Interest	None	None
Chase Bank Savings Steve		\$15,001 - \$50,000	Interest	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Debt owed by Steve Isakson for Congress		\$15,001 - \$50,000	Interest	None	None
Etrade Brokerage Acct ⇒ Acct Cash Holdings		\$15,001 - \$50,000	Interest	\$1 - \$200	None
Etrade Brokerage Acct ⇒ Nokia Corporation Sponsored American Depositary Shares (NOK)		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Etrade Brokerage Acct ⇒ Osram Licht AG Namens - Aktien ON (OSAGF)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Etrade Brokerage Acct ⇒ Rite Aid Corporation (RAD)		\$15,001 - \$50,000	None		
Etrade Brokerage Acct ⇒ Siemens AG Ordinary Shares (SMAWF)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Etrade Brokerage Acct ⇒ Tesla Motors, Inc. (TSLA)		\$15,001 - \$50,000	None		
Lobos Ave.  LOCATION: Atascadero, CA, US DESCRIPTION: Residential property used as office	JT	\$100,001 - \$250,000	None		
Merrill Edge SEP ⇒ BofA RASP		\$15,001 - \$50,000	Tax-Deferred		
Merrill Edge SEP ⇒ Columbia Select Large		\$1,001 - \$15,000	Tax-Deferred		
Merrill Edge SEP ⇒ Columbia Small Cap		\$1,001 - \$15,000	Tax-Deferred		
Merrill Edge SEP ⇒ Putnam Multi Cap Growth		\$15,001 - \$50,000	Tax-Deferred		
Robobank Judith	SP	\$1,001 - \$15,000	Tax-Deferred		
Robobank Steve		\$1,001 - \$15,000	Tax-Deferred		
RPS 401k Plan ⇒ Amfds New Wld R6		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SESLOC Federal Credit Union	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Siemens Pension Plan	SP	Undetermined	None		
Siemens Savings Plan 401k ⇒ Core Bond Fund	SP	\$100,001 - \$250,000	Tax-Deferred		
Siemens Savings Plan 401k ⇒ High Yield Fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Siemens Savings Plan 401k ⇒ Stable Value Fund	SP	\$15,001 - \$50,000	Tax-Deferred		
Siemens Savings Plan 401k ⇒ US Large Cap Stock Fund	SP	\$100,001 - \$250,000	Tax-Deferred		
Siemens Savings Plan 401k ⇒ US Small-Mid Cap Stock Fund	SP	\$50,001 - \$100,000	Tax-Deferred		

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Rantec Power Systems Inc	Salary	\$57,405.6	\$163,839.04
Siemens Medical Solutions USA	Spouse's Salary	N/A	N/A
Cerner Health Services, Inc.	Spouse's Salary	N/A	N/A
Siemens Pension Plan	Spouse's Pension	N/A	N/A
Spouse's Siemens's Savings Plan 401k	Spouse's 401k	N/A	N/A
Spouse's Siemens's Savings Plan 401k	Spouse's 401k	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner/Proprietor	Isakson Engineering

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Cerner Corporation Foundation Retirement Plan 401k (Owner: SP)
- Etrade Brokerage Acct  
LOCATION: US
- Merrill Edge SEP
- RPS 401k Plan
- Siemens Savings Plan 401k (Owner: SP)

## 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:** Dr. Steve Wesley Isakson , 05/7/2016