



Filing ID #10008704

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Ami Bera
Status: Member
State/District: CA07

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2014
Filing Date: 10/6/2015

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|----------------|----------------------|--------------------------|
| 1524 32nd Street, Sacramento, CA LOCATION: Sacramento, CA, US | JT | \$250,001 - \$500,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| 2101 39th Street, Sacramento, CA LOCATION: Sacramento, CA, US | JT | \$250,001 - \$500,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| 2231 36th Street, Sacramento, CA LOCATION: Sacramento, CA, US | JT | \$250,001 - \$500,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| 2536 39th Street, Sacramento, CA LOCATION: Sacramento, CA, US | JT | \$100,001 - \$250,000 | Rent | \$5,001 - \$15,000 | <input type="checkbox"/> |
| 2642 43rd Street, Sacramento, CA LOCATION: Sacramento, CA, US | JT | \$100,001 - \$250,000 | Rent | \$5,001 - \$15,000 | <input type="checkbox"/> |
| 2717 P Street, Sacramento, CA | JT | \$250,001 - \$500,000 | Rent | \$50,001 - \$100,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|----------------------------------|-------|-----------------------|----------------|---------------------|--------------------------|
| LOCATION: Sacramento, CA, US | | | | | |
| 4601 V Street, Sacramento, CA | JT | \$250,001 - \$500,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Sacramento, CA, US | | | | | |
| 4640 U Street, Sacramento, CA | JT | \$250,001 - \$500,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Sacramento, CA, US | | | | | |
| 6211 Broadway, Sacramento, CA | JT | \$250,001 - \$500,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Sacramento, CA, US | | | | | |
| 6337 Rampart, Sacramento, cA | JT | \$250,001 - \$500,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Sacramento, CA, US | | | | | |
| American Cent Inter | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| amg yacktman focus | JT | \$50,001 - \$100,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Baird Core Plus Bond | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| BGI US Equity Account 1 | SP | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |
| BGI US Equity-Account 2 | SP | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| Capital Guardian- Account 1 | SP | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| Capital Guardian- Account 2 | SP | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| EG Shares | JT | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Elk Grove Commerce Bank | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| First Trust Morningstar Dividend | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--------------------------------|-------|----------------------|----------------|-------------------|--------------------------|
| Fixed Income Fund | SP | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| Golden One Credit Union | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Guggenheim ETF | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Guggenheim ETF- Account 1 | | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Harding Loevner Emerging | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| India Fund | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Invesco Convertable | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| iShares Core S&P- Account 3 | JT | \$50,001 - \$100,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| iShares Core S&P-Account 1 | | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| iShares Core S&P-Account 2 | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| iShares MSCI CDA | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| iShares MSCI Growth | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| iShares MSCI Japan | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| iShares Nasdaq Biotechnology | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| iShares S&P 500 Value | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| iShares S&P Growth | JT | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| iShares SPDR Industrial Select | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|-------------------------------------|-------|-------------------------|----------------|---------------------|-------------------------------------|
| iShares TR MSCI EAFE | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Janus Balanced Fund | JT | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Metropolis Investment Total | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Oakmark International Fund Class | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Oppenheimer Developing | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Oppenheimer Global S | JT | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Oppenheimer S | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Parnassus Core Equity | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Parnassus Core Equity Fund | JT | \$50,001 - \$100,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Pimco Total Return | JT | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Promissory Note Colonial Mutual | JT | \$500,001 - \$1,000,000 | Interest | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Safe Credit Union | JT | \$15,001 - \$50,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Schwab 529 Plan | JT | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| Schwab Checking | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Schwab Muni Money Fund | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Scout International Fund- Account 2 | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Scout International Fund-Account 1 | JT | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---------------------------------|-------|-----------------------|---------------------|-------------------|--------------------------|
| Scout Small Cap | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Sector SPDR Energy Select | | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Sector SPDR Financial | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Sector SPDR Industrial Select | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Sector SPDR Materials Fund | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Sector SPDR Tech Select | JT | \$50,001 - \$100,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| SPDR S&P International Dividend | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| SPDR S&P Regional Banking | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| T Rowe Price Global | | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| TPMG Conservative | SP | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| TPMG Mod- Account 2 | SP | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| TPMG Moderate Account 1 | SP | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| UBS Global Asset | SP | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| Vanguard CA Inter Term | JT | \$50,001 - \$100,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Vanguard FTSE Emerging | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Wells Fargo Checking | JT | \$50,001 - \$100,000 | Dividends, Interest | \$1 - \$200 | <input type="checkbox"/> |
| Wells Fargo Savings | JT | \$15,001 - \$50,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|-------|-------|----------------|----------------|--------|----------------|
| | | | | | |

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

| Source | Type | Amount |
|------------------------------|---------------|--------|
| The Permanante Medical Group | Spouse Salary | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|----------------------------|---------------|-------------------------------------|-----------------------|
| JT | Safe Credit Union | November 2008 | Morgage, Elk Grove, CA | \$250,001 - \$500,000 |
| JT | Bank of America | March 2008 | Mortgage on Rental, Sacramento, CA | \$100,001 - \$250,000 |
| JT | Coldwell Banker Home Loans | June 2008 | Mortgage on Rental, Sacramento, CA | \$100,001 - \$250,000 |
| JT | Coldwell Banker Home Loans | June 2009 | Mortgage on Rental, Sacramento, CA | \$100,001 - \$250,000 |
| JT | Coldwell Banker Home Loans | June 2006 | Mortgage on Rental Property, Sac CA | \$100,001 - \$250,000 |
| JT | Coldwell Banker Home Loans | June 2008 | Mortgage on Rental Property, Sac CA | \$100,001 - \$250,000 |
| JT | Evergreen Mortgage | January 2013 | Mortgage ,Washington DC | \$250,001 - \$500,000 |
| JT | Coldwell Banker Home Loans | June 2011 | Mortgage on Rental Property, Sac CA | \$100,001 - \$250,000 |
| JT | Coldwell Banker Home Loans | November 2009 | Mortgage on Rental, Sacramento, CA | \$100,001 - \$250,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|--------------------------------|-------------------------|
| Clinical Professor of Medicine | University of CA, Davis |
| CEO, President | Mango Management Inc |

| Position | Name of Organization |
|----------|----------------------|
|----------|----------------------|

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

| Trip Details | | | | | Inclusions | | |
|----------------------------|------------|-----------|---|------------------|-------------------------------------|-------------------------------------|--------------------------|
| Source | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| Alliance for Health Reform | 02/28/2014 | 03/3/2014 | Washington, DC - Houston, TX - Washington, DC | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

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: Hon. Ami Bera , 10/6/2015