|   |   | <b>BLT 3 N 2017</b> 0  |
|---|---|--|
| UNITED STATES HOUSE OF REPRESENTATIVES For New  | <b>FORM B</b> For New Members, Candidates, and New Employees  | LEGISLATIVE RESOURCE CENTER  |
| Stewart I Levenson, MD  Daytime   | Daytime Telephone:  | 17 NOV -7 PN 1: 14   |
| New Member of or Candidate for State: NH  U.S. House of Representatives District: 2  Candidates – Date of Election: Nov (**)  | Check if Amendment  | 3.S. H@bSc Of REPRESENTATIVES  (Office Use Only)   |
| STATUS  New Officer or Employee  Staff Filer Type (If Applicable):  Employing Office:  Shared  Principal Assistan   | teto  | A \$200 penalty shall be assessed against any individual who files more than 30 days late. |
| PRELIMINARY INFORMATION – ANSWER <u>EACH</u> OF THESE   | QUESTIONS   |  |
| A. Did you, your spouse, or your dependent child:     a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? Or     b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?          | E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?                                       | ng the reporting Yes No  |
| C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the Yes No reporting period?   | F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing? | arrangement with an Yes No   |
| D. Did you, your spouse, or your dependent child have any reportable Yes No liability (more than \$10,000) at any point during the reporting period?  | J. Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years?  | r years? Yes No  |
| ATTACH THE CORRESPOND THIS FORM INCLUDES ONLY THE SCHI  | ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES" THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE   | 3"<br>COMPLETE   |
| EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION -  | ANSWER BOTH OF  | THESE QUESTIONS  |
| TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need from this report details of such a trust that benefits you, your spouse, or dependent child?   | nd certain other "excepted trusts" need not be disclosed. Have you excluded   | Have you excluded Yes No No  |
| <b>EXEMPTION</b> – Have you excluded from this report any other assets, "unearned" income, 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 Ethics. | liabilities of a spouse or dependent child because they mee   | et all three tests for Yes No No   |

## SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

Stewart I Levenson, MD

| KHO KOMBON | HYH Howard Houth | CMS Emuny | c Citibant | DRK'D Bookding & | ABC Hedge Fund X      | Examples: | DC. Mega Corp Stock                              | For bank and other cash accounts, total the amount in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts.  For rental and other real property held for investment, provide a complete address or description, e.g., rental property, and a city and state.  For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.  Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.  If you have a privately-traded fund that is an Excepted investment Fund, please check the "EIF" box.  If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC), or jointly held with anyone (JT), in the optional column on the far left.  For a detailed discussion of Schedule A requirements, please refer to the instruction booklet. | For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that exceeds the reporting thresholds. | Provide complete names of stocks and mutual funds (do not use only ticker symbols).           | Identify (a) each asset held for investment or production of income and with a fair market value exceeding \$1,000 at the end of the reporting period and (b) any other reportable asset or source of income which generated more than \$200 in "unearned" income during the year.   | Assets and/or Income Sources | BLOCK A  |
|------------|------------------|-----------|------------|------------------|-----------------------|-----------|--|--|--|---|--|------------------------------|----------|
|            |                  |           |            |                  |                       |           |  | None >   | Ţ  | *Column M is for assets held by your spouse or dependent child in which you have no interest. |  |                              |          |
|            | <u> </u>         |           | _          |                  | <u> </u>              | _         |  | \$1-\$1,000 œ  | 4  | in man  | ate value fy the assumed the documents of the lone.  |                              |          |
|            | ļ                |           |            |                  |                       | ndefinite | ļ  | \$1,001-\$15,000   |  | ich y   | ation<br>ation<br>met<br>of we<br>nly b  |                              |          |
| <u> </u>   | -                |           |            | <                | <del> </del>          | - 187     |  | \$15,001-\$50-000  | 4  | or as   | of ass<br>met<br>hod<br>as so<br>ecau  |                              |          |
|            |                  |           | _          | -                |                       | -         | ×  | \$50,001-\$100,000 m   | _  | ave r   | set at   | Val.                         |          |
|            |                  |           |            |                  |                       | -         | ļ  | \$100,001-\$250,000  | 4  | o int   | t dos<br>other<br>luring<br>gene   | <u> </u>                     | Ы        |
|            |                  |           |            |                  | ×                     | +         | -  | \$250,001-\$500,000  | -  | teres   | the of the than the the  | Value of Asset               | BLOCK B  |
|            |                  |           |            |                  | ļ                     | -         |  | \$500,001\$1,000,000 ==  | 4  | i our   | the reporting  | SSE                          | ۳        |
|            |                  |           |            |                  | -                     | -         | <u> </u>   | \$1,000,001-\$5,000,000  |  | spou  | ortin<br>mari  | ×                            | 1        |
|            |                  |           |            |                  |                       | ↓_        |  | \$5,000,001-\$25,000,000   | 4  | S8 0  | ing p<br>(et v:<br>g pe<br>the v   |                              |          |
|            |                  |           |            |                  | _                     | 1         | ļ  | \$25,000,001 \$50,000,000  | 4  | r deb   | eriox<br>alue,<br>alue,<br>alue  |                              |          |
|            | ļ                |           |            |                  |                       | 1         |  | Over \$50,000,000  | 4  | ğ   | d. If y<br>plea<br>and<br>sho  |                              |          |
|            |                  |           |            | -                | -                     | +         |  | Spouse/DC Asset over \$1,000,000*  | ╄  |   |  |                              |          |
|            | ļ .              |           |            |                  |                       |           |  | NONE   |  | "None" if the asset gene during the reporting period.   | Check all columns that generate tax-de 401(k), IRA, or 529 at the "Tax-Deferred interest, and cap relinvested, must be for assets held in tax  |                              |          |
| X          | ×                | ᅩ         | Х.         | ×                | <u> </u>              |           | ×  | DIVIDENDS  |  | \$ =  | oner<br>Tax-   |                              |          |
|            |                  |           |            |                  |                       | _         |  | RENT   |  | repo<br>the   | ate t<br>are t<br>Defe   | ₹                            |          |
|            |                  |           |            |                  |                       |           |  | INTEREST   |  | ning  | mns i<br>ax-d<br>529 a<br>rned<br>rned<br>lin t  | 8                            | <u>p</u> |
|            |                  |           |            |                  |                       |           |  | CAPITAL GAINS  |  | penic<br>ge   | that a<br>efem-<br>accou<br>col<br>pital   | Type of Income               | BLOCK C  |
|            |                  |           |            |                  | ļ                     | T         |  | EXCEPTED/BLIND TRUST   |  | , nera  | at apply. ferred in counts), counts), column. thal gas disclose cable ac   | ç                            | ဂ်       |
|            |                  |           | <u> </u>   |                  |                       |           |  | TAX-DEFERRED   |  | 2   | you Fo   | ⊞e                           |          |
|            |                  |           |            |                  | Partnership<br>Income | Royalties |  | Other Type of Income (Specify: e.g., Partnership Income or Farm Income)  |  | no income   | Check all columns that apply. For accounts that generate tax-deferred income (such as 401(t), IRA, or 529 accounts), you may check the "Tax-Deferred" column. Dividends, interest, and capital galles, even if reinvested, must be disclosed as income for asserts held in taxable accounts. Check   |                              |          |
|            |                  |           |            | 又                | 0.0                   |           |  | None - I   | 1  |   |  |                              | $\neg$   |
|            |                  |           |            | ļ                |                       |           | ×  | \$1-\$200 =  |  |   | For assets in assets in capital Check "Column  |                              |          |
| ×          | ス                | Х         | ス          | *                |                       | T         | <del>                                     </del> | \$201-\$1,000 ==   |  |   | None ats fo  |                              |          |
|            |                  |           |            |                  |                       | T         |  | \$1,001-\$2,500  |  |   | e, ey<br>e, ey<br>is fo  |                              |          |
|            |                  |           |            |                  |                       | ×         | T  | \$2,501-\$5,000 < 🗧  | Ì  |   | ichy<br>Nen in<br>no inc   |                              |          |
|            |                  |           |            |                  | ×                     | T         | <u> </u>   | \$2,501-\$5,000 < Curent \$5,001-\$15,000  |  |   | ouch<br>altego<br>freil<br>come  |                              |          |
|            |                  |           |            |                  |                       |           |  | \$15,001-\$50,000 ≦  | ; <b> </b>   |   | neck<br>nves<br>was  |                              |          |
|            |                  |           |            |                  |                       |           |  | \$50,001-\$100,000   |  |   | ean T  |                              |          |
|            |                  |           |            |                  |                       |           |  | \$100,001-\$1,000,000 🛪  |  |   | ax-D<br>mus<br>ned c   |                              | l        |
|            |                  |           |            |                  |                       |           |  | \$1,000,001-\$5,000,000 ×  |  |   | wefen<br>bych<br>atbe  | ¥                            |          |
|            |                  |           |            |                  |                       |           |  | Over \$5,000,000 ≚   |  |   | red" i<br>hecki<br>disc<br>nerat   | ě                            | _ [      |
|            |                  |           |            |                  |                       |           |  | Spouse/DC Income over \$1,000,000*   ≚   |  |   | For assets for which you checked "Tax-Deferred" in Block C, you may check the "None" column. For all other assets indicate the category of income by checking the appropriate box below. Dividends, Interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check "None" if no income was earned or generated.  Column XII is for assets held by your spouse or dependent child in which you have no interest. | Amount of Income             | BLOCK D  |
|            |                  |           |            | X                |                       |           |  | None –   |  |   | Ten Back   | 3                            | Š        |
|            |                  |           |            |                  |                       |           |  | \$1-\$200 =  |  |   | pprop  | Č                            |          |
| X          | X                | X         | ス          | 3                |                       |           | ×  | \$201-\$1,000  |  |   | ı may<br>omate<br>oma  | ne                           | ŀ        |
|            |                  |           |            |                  |                       | $\perp$   | <u> </u>   | \$1,001-\$2,500 <  | ,  |   | for the  |                              |          |
|            |                  | <u> </u>  | ļ          |                  | <u>L</u>              | _         |  | \$2,501-\$5,000 < 6  |  |   | ck th<br>belo  |                              | į        |
|            |                  |           | <u> </u>   | ļ                | -                     | ×         | _  | \$2,501-\$5,000 < \$5,001-\$15,000   | :  |   | have   |                              |          |
|            |                  |           |            | ļ                | ×                     | +         | <del> </del>                                     | \$15,001-\$50,000 ≦ 💆  |  |   | one".<br>Divid   |                              | J        |
|            |                  |           |            |                  | -                     | -         | <u> </u>   | \$50,001-\$100,000 ≦   |  |   | colur<br>lend:<br>1 tax  |                              | J        |
|            |                  |           |            |                  | ↓_                    | +         | <del> </del>                                     | \$100,001\\$1,000,000  |  |   | nn.  <br>s, in<br>abte   |                              | J        |
|            | <u> </u>         |           | <u> </u>   |                  | -                     | $\perp$   | <u> </u>   | \$1,000,001-\$5,000,000 ×  |  |   | For a<br>teres   |                              | J        |
|            |                  | ļ         |            |                  | <del> </del>          | _         | _  | Over \$5,000,000 🗵   |  |   | iii ot<br>Brt, be  |                              | J        |
|            |                  |           | Ĺ          |                  | ĺ                     |           |  | Spouse/DC income over \$1,000,000*   ≦   |  |   | ज़ द्र ब्  |                              |          |

Use additional sheets if more space is required.

| sp,      |  |            |                | Assets and/or Income Sources | BLOCK A | SCHEDULE A ~ ASSETS & "UNEARNED INCOME" |
|----------|--|------------|----------------|------------------------------|---------|---|
|          | None   |            | >              |                              |         | Şο                                      |
|          | \$1-\$1,000  |            | œ              |                              |         | ےُ                                      |
|          | \$1,001-\$15,000   |            | 0              |                              |         | Ž                                       |
| _        | \$15,001-\$50,000  |            | ·              |                              | ł       | m<br>>                                  |
|          | \$50,001-\$100,000   |            | m<br>          | Yah                          |         | 2                                       |
|          | \$100,001-\$250,000  |            | 77             | je c                         | ST.O    | m                                       |
| _        | \$250,001-\$500,000<br>\$500,001-\$1,000,000                               |            | ெ<br>エ         | Value of Asset               | вгоск в | D                                       |
| -        | \$1,000,001-\$5,000,000  |            |                | ssei                         |         | Ž                                       |
|          | \$5,000,001-\$25,000,000   |            | _              | _                            |         | $\sim$                                  |
|          | \$25,000,001-\$50,000,000  |            | _              |                              |         | Ž                                       |
|          | Over \$50,000,000  |            | - 1            |                              |         | μĨ                                      |
|          | Spouse/DC Asset over \$1,000,000*  |            | <              |                              |         |   |
|          | NONE   |            |                |                              |         |   |
|          | DIVIDENDS  |            |                |                              | l       |   |
|          | RENT   |            |                | J                            |         |   |
|          | INTEREST   |            |                | þe                           | ፴       |   |
|          | CAPITAL GAINS  |            |                | <u></u>                      | BLOCK C |   |
|          | EXCEPTED/BLIND TRUST   |            |                | Type of Income               | ဂ်      | <u>.</u>                                |
|          | TAX-DEFERRED   |            |                | me                           | l       | UV                                      |
|          | Other Type of Income (Specify: e.g.,<br>Partnership Income or Farm Income) |            |                |                              |         | <sub>Name:</sub> Stewart                |
|          | None   | _          | Π              |                              |         | ヸヿ                                      |
| _        | \$1-\$200  | =          |                |                              | ł       | <del>-</del>                            |
|          | \$201-\$1,000  | =          |                |                              | - 1     |   |
| -1       | \$1,001-\$2,500  | ~          |                |                              |         |   |
| 4        | \$2,501-\$5,000  | _<         | Ę              |                              |         |   |
|          | \$5,001-\$15,000<br>\$15,001-\$50,000                                      | _≤<br>_≦   | Current Year   |                              | ı       | Levenson, MD                            |
| 1        | \$50,001-\$100,000   |            | <b>ĕ</b>       |                              |         | 12                                      |
| 1        | \$100,001-\$1,000,000  | =<br>=     |                |                              |         | -                                       |
| -        | \$1,000,001-\$5,000,000  | ~×         |                | ₹                            |         |   |
|          | Over \$5,000,000   | ×          | <b> </b>       | Amount of Income             | _       |   |
|          | Spouse/DC income over \$1,000,000*   | ≚          | Ш              | nt o                         | BLOCK D |   |
| _]       | None   | _          |                | Ť                            | Ä       |   |
| _        | \$1-\$200  | _=         |                | COM                          | 1       |   |
| -        | \$201-\$1,000  | =          |                | ٠                            | }       |   |
| $\dashv$ | \$1,001-\$2,500<br>\$2,501-\$5,000   | ~          | Pre            |                              |         | Page_                                   |
| ┨        | \$5,001-\$5,000<br>\$5,001-\$15,000  | · <u>`</u> | Preceding Year |                              |         | [ <del>[</del> 6                        |
| +        | \$15,001-\$50,000  | <br>≦      | ا ق            |                              | Ī       |   |
| 1        | \$50,001-\$100,000   |            | ĕ              |                              |         | T I                                     |
| ]        | \$100,001-\$1,000,000  | ヌ          | ۳              |                              | j       | 4                                       |
|          | \$1,000,001-\$5,000,000  | ×          |                |                              | 1       | الح                                     |
| 1        | Over \$5,000,000   | ×          |                |                              | .       |   |
|          |  |            |                |                              |         |   |

|               |             |              |            |             |            |           |                 |                  |             |              |            |               |           |              | 크롱维        |  |        |             |              |                              | _ |
|---------------|-------------|--------------|------------|-------------|------------|-----------|-----------------|------------------|-------------|--------------|------------|---------------|-----------|--------------|------------|--|--------|-------------|--------------|------------------------------|---|
| ED 0 0 0 1.   | KO brancola | CVX Churren  | CM CDN MBI | BP BPPLCADS | BCE BOEING | T ATET    | AZN astronymics | AEP Communa Elec | Mo altria   | ABBY Abbaile | 2TS 700tm  | XOM Buon Bob! | PED Pursi | MMM 3MCm     | ASSET NAME |  |        |             |              | Assets and/or income Sources |   |
|               |             |              |            |             |            |           |                 |                  |             |              |            |               |           |              | <b>E</b>   |  |        |             |              | •                            |   |
|               |             |              |            |             |            |           |                 |                  |             |              |            |               |           |              |            | None   |        | >           |              |                              |   |
|               |             |              |            |             |            |           |                 | Ī                |             |              |            | ۷             |           |              |            | \$1-\$1,000  |        | 00          |              |                              |   |
| <             |             |              | (          |             |            |           |                 | <                |             |              |            |               | <         | <            |            | \$1,001-\$15,000   |        | റ           |              |                              |   |
|               | /           | /            | <u> </u>   | <           | (          | 1         | ر               | ļ.,              | <u></u>     | _<_          | <u> </u>   |               |           |              |            | \$15,001-\$50,000  |        | o           |              |                              |   |
|               |             |              |            |             | Ľ          |           |                 | ļ <u>.</u>       |             |              | <          | _             | <u> </u>  |              |            | \$50,001-\$100,000   |        | m_          |              | ٧a                           |   |
|               |             |              |            | <u> </u>    | ļ          |           |                 | _                | ļ           |              | ļ          | ļ             |           |              |            | \$100,001-\$250,000  |        | 71          | _            | lue                          |   |
|               |             |              |            |             |            | <u> </u>  |                 |                  |             |              |            |               | Ĺ         | <u> </u>     |            | \$250,001-\$500,000  |        | മ           |              | 웃                            |   |
|               |             |              |            |             | <u> </u>   |           | ļ               |                  |             |              |            |               | ļ         |              |            | \$500,001-\$1,000,000  |        | Ξ           | 4            | Value of Asset               |   |
|               |             |              |            |             |            | ļ.,       | ļ               | ļ                | ļ           | ļ            |            |               |           |              |            | \$1,000,001-\$5,000,000  |        |             | i            | P.                           |   |
|               |             |              |            |             |            | _         |                 | <u> </u>         |             |              |            | ļ. <u>.</u> . |           |              |            | \$5,000,001-\$25,000,000   |        | _           | 4            |                              |   |
| _             |             |              |            |             |            |           | _               |                  |             |              |            |               |           |              |            | \$25,000,001-\$50,000,000  |        |             | 4            |                              |   |
|               | į           |              |            | ļ           |            | <u> </u>  |                 | ļ                |             |              |            | ļ             | <u> </u>  |              |            | Over \$50,000,000  |        |             | -{           |                              |   |
| $\dashv$      |             |              | <          |             | <u> </u>   |           |                 | <del> </del>     |             |              |            |               |           | ļ            |            | Spouse/DC Asset over \$1,000,000*  |        | <           | <del> </del> |                              | - |
| _             |             |              | _          | _           |            | -         |                 | <u> </u>         |             | <u> </u>     |            | <u> </u>      |           |              |            | NONE   |        |             | -            |                              |   |
|               | <b>\</b>    | <u> </u>     |            |             |            |           | \               | <u> </u>         | _           |              | _          | <u> </u>      | _         | _            |            | DIVIDENDS  |        |             |              |                              |   |
|               |             |              |            | ļ           |            | <u> </u>  |                 |                  |             |              | -          |               | ļ         |              |            | RENT   |        |             | -            | 둫                            |   |
| _             |             |              |            | ļ           |            |           | <u> </u>        |                  | <del></del> |              |            | <u> </u>      |           |              |            | INTEREST   |        |             |              | ŏ                            |   |
|               |             |              | _          |             |            | <u> </u>  |                 |                  |             |              | ļ <u>.</u> |               |           | <u></u>      |            | CAPITAL GAINS  |        |             |              | <u> </u>                     |   |
|               |             |              |            |             |            |           | L               | ļ                |             |              |            |               |           |              |            | EXCEPTED/BLIND TRUST   |        |             |              | Type of Income               |   |
| -             |             |              |            |             | ļ          |           | -               | <u> </u>         | ļ           |              |            | ļ             |           |              |            | TAX-DEFERRED   |        |             | 4            | ត                            |   |
|               |             |              |            |             |            |           |                 |                  |             |              |            |               |           |              |            | Other Type of Income (Specify: e.g.,<br>Partnership Income or Farm Income) |        |             |              |                              |   |
|               |             |              | <          |             |            |           |                 |                  |             | ₹            |            |               |           |              |            | None   |        | Γ           | T            |                              |   |
|               |             |              |            |             |            | <u> </u>  |                 |                  |             |              | A.         | 4             | 19        |              |            | \$1-\$200  | =      | İ           |              |                              |   |
| <u>{</u>      | 8           | $\bigotimes$ |            | Ø           | (8)        | $\otimes$ | $\otimes$       | $\otimes$        | $\otimes$   |              | 8          | (%)           | (%)       | $\otimes$    |            | \$201-\$1,000  | =      | •           |              |                              |   |
|               |             |              |            |             | ļ          |           |                 | <u> </u>         |             |              | _          | L             |           |              |            | \$1,001-\$2,500  | ₹      | Ļ           |              |                              |   |
| $\dashv$      |             |              |            |             |            | ļ         |                 |                  |             |              |            | <u> </u>      |           |              |            | \$2,501-\$5,000  | <      | Įξ          |              |                              |   |
|               |             |              |            |             |            |           |                 | <u> </u>         |             |              |            |               |           |              |            | \$5,001-\$15,000   | ≤      | <u>e</u>    |              |                              |   |
|               |             |              |            |             |            |           | <u> </u>        | ├                |             |              |            |               |           | _            |            | \$15,001-\$50,000  | ≦ <    | urrent Year | 1            |                              |   |
|               |             |              |            |             |            | <u> </u>  |                 |                  |             |              |            |               |           |              |            | \$50,001-\$100,000   | VIII E | 윽           | 1            |                              |   |
| $\dashv$      |             |              |            |             | <u> </u>   | ļ         | -               | -                |             |              |            |               |           |              |            | \$100,001-\$1,000,000  | ×      | ĺ           | ,            | >                            |   |
| $\dashv$      |             |              |            |             |            |           |                 | ├─               |             |              |            | <del> </del>  |           |              | -          | \$1,000,001-\$5,000,000<br>Over \$5,000,000                                | _×     | ĺ           |              | Amount of Income             |   |
| -             |             |              |            |             |            |           |                 |                  |             |              |            |               |           |              |            | Spouse/DC Income over \$1,000,000*   |        |             | ]            | <u>.</u>                     |   |
| +             |             |              | į          |             |            |           | <del></del>     |                  |             | Z            |            |               |           |              |            | None   | _      | H           | 1            | 2                            | 0 |
| -             |             |              |            |             |            |           |                 |                  |             | _            | Ne         | Tit.          |           |              | L          | \$1-\$200  | _      |             |              | 7                            | t |
| <b>&lt;</b> ) | <b>(2</b> ) | <b>X</b> \   |            | <b>水</b>    | <b>図</b> ) | (X)       | $\bigcirc$      | B                | R)          |              | 么          | B)            | N)        | 玆            |            | \$201-\$1,000  | =      |             |              | Í                            |   |
|               | V           | _            |            | J           | ~          | <u> </u>  |                 | U                | ~           |              | J          |               | اك        | $\dot{\Box}$ |            | \$1,001-\$2,500  | ~      | <b> </b>    | 1 '          | -                            |   |
| T             |             |              |            |             |            |           |                 |                  |             |              |            | <u> </u>      |           |              |            | \$2,501-\$5,000  | <      | ğ           |              |                              |   |
| 7             |             |              |            |             |            |           |                 |                  |             |              |            |               |           |              |            | \$5,001-\$15,000   | _≤     | Preceding   |              |                              |   |
| $\Box$        |             |              |            |             |            |           |                 |                  |             |              |            |               |           |              |            | \$15,001-\$50,000  | ≦      | g           |              |                              |   |
|               |             |              |            |             |            |           |                 |                  |             |              |            |               |           |              |            | \$50,001-\$100,000   | IIIA   | Year        |              |                              |   |
|               |             |              |            | ]           |            |           |                 | <u> </u>         |             |              |            |               |           |              |            | \$100,001-\$1,000,000  | ×      | ٦           | 1            |                              |   |
|               |             |              |            | ]           |            |           |                 |                  |             |              |            |               |           | $\Box$       |            | \$1,000,001-\$5,000,000  | ×      |             |              |                              |   |
|               |             |              |            |             |            |           |                 |                  |             |              | L          |               |           |              |            | Over \$5,000,000   | ≚      | Ī           | I            |                              |   |
|               |             |              |            |             |            |           |                 | _                | - 1         |              |            |               |           |              |            | Spause/OC Income over \$1,000,000*   | ×      |             |              | -                            |   |

|   |                            | HEDULE A - ASSETS & "UNEARNED INCOME" |
|---|----------------------------|---------------------------------------|
|   | Name:                      |                                       |
|   | Cremait I readination, MID | Stowart I overson Mo                  |
| ľ |                            |                                       |

|           | 4) | PG Pooter & Couble | PPL PPL Comp | PM Phillip morris                                | OXY orind petros | NGG Justing agich                                | MIK THAK CO  | KMB Break Cont | GSK gans Stalker | GIS amphilles | XOM Exmandel                                     | DUK Date Sterry | Dowing Energy                                    | CCI Comfalle                                     | SP, ASSET NAME EIF |  |              | Assets and/or Income Sources | BLOCK A |
|-----------|----|--------------------|--------------|--|------------------|--|--------------|----------------|------------------|---------------|--|-----------------|--|--|--------------------|--|--------------|------------------------------|---------|
| -         |    |                    |              |  |                  | <u> </u>   |              | _              | م                |               |  | -               |  | -  | #                  | N  | r            |                              |         |
|           |    |                    | -            |  |                  | -  | <del> </del> | <del> </del>   |                  |               |  | <u> </u>        |  | -  |                    | None >><br>\$1-\$1,000 œ   |              |                              |         |
| ┝         | (  | •                  | }—           |  |                  | -  | <del> </del> | 1              |                  | Z             | <del>  -</del>                                   | <del> </del>    | 1  | <del>  -</del>                                   |                    | \$1,001-\$15,000 C   | _            |                              | Ì       |
|           |    | /                  |              | ,  |                  | 1  | ١            |                | ٠.               |               | ~  | ر               | 1  | ١  |                    | \$15,001-\$50,000  | _            |                              |         |
|           |    |                    | -            | -  | <u> </u>         |  |              |                |                  |               |  |                 | -  | _  |                    | \$59,001-\$100,000 m   | _            | <                            | ı       |
|           | -  |                    |              |  | -                |  |              |                |                  |               |  |                 | $\vdash$   | <del> </del>                                     |                    | \$100,001-\$250,000  |              | a u                          |         |
|           |    |                    |              |  |                  |  | <u> </u>     |                |                  | -             |  |                 | "  | <del>                                     </del> |                    | \$250,001-\$500,000 a  | 1            | 9                            | вгоск в |
|           |    |                    |              |  |                  |  | T            |                |                  |               |  | 1               |  | 1  |                    | \$500,001-\$1,000,000 ±  |              | Value of Asset               | S.      |
|           |    |                    | <u> </u>     |  |                  |  |              |                |                  |               | <del>                                     </del> |                 |  | <del>                                     </del> |                    | \$1,000,001-\$5,000,000 —  | 1            | set                          |         |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 | 1  | 1  |                    | \$5,000,001-\$25,000,000 <u></u>   |              |                              |         |
|           |    |                    |              | ļ  |                  |  |              |                |                  |               |  |                 | T .  |  |                    | \$25,000,001-\$50,000,000  |              |                              |         |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 |  |  |                    | Over \$50,000,000 -  |              |                              |         |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 |  |  |                    | Spouse/DC Asset over \$1,000,000*  |              |                              |         |
| マ         | 1  |                    |              |  | <_               |  |              |                |                  |               |  |                 |  |  |                    | NONE   | Т            | -                            |         |
|           |    | ۷                  | <            | ر  |                  | <  | (            | ر              | ٠.               | 4_            | <u>, C</u>                                       | ر               | <  | ~  |                    | DIVIDENDS  |              |                              |         |
|           |    |                    |              |  |                  |  | T            |                |                  |               |  |                 |  |  |                    | RENT   |              | J                            |         |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 | 1  | -  |                    | INTEREST   |              | þe                           |         |
|           |    |                    |              | ļ  |                  |  | 1            | T              |                  | <b></b>       |  |                 | <del>                                     </del> | "  |                    | CAPITAL GAINS  |              | <u>약</u>                     | BLOCK C |
|           |    |                    |              | <del>                                     </del> |                  | <del> </del>                                     |              |                |                  |               |  |                 | -  | <u> </u>   |                    | EXCEPTED/BLIND TRUST   | 1            | Type of Income               | ñ       |
|           |    |                    |              |  |                  | <del> </del>                                     |              |                |                  |               | -  |                 |  |  |                    | TAX-DEFERRED   | -            | ă                            |         |
|           |    |                    | _            |  |                  |  |              |                |                  |               | -  |                 |  |  |                    | Other Type of Income (Specify: e.g.,<br>Partnership Income or Farm Income) |              |                              | ł       |
| 7         | 7  |                    |              |  | 2                |  |              |                |                  |               |  |                 | -  |  |                    | None –   | ╅            |                              | ┪       |
|           |    | -                  | _            |  |                  |  |              |                |                  |               |  |                 |  | 8  |                    | \$1-\$200 =  |              |                              | - 1     |
|           |    | 91                 | 8            | (8)  | '                |  | R)           | <i>(</i> 2)    |                  | 久)            | K)   | (2)             | 8  |  |                    | \$201-\$1,000 =  |              |                              | ı       |
|           |    |                    |              |  |                  | (3)  | <u>@</u>     |                | Q1               |               |  |                 |  |  |                    | \$1,001-\$2,500 <  | ı            |                              | Į       |
|           |    |                    |              |  |                  |  |              |                | )                |               |  |                 |  |  |                    | \$2,501-\$5,000 <  | ₽            |                              |         |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 |  |  |                    | <b>\$</b> 5,001- <b>\$</b> 15,000 ≤  | <u> </u>     |                              | - 1     |
|           |    |                    |              |  |                  |  |              |                |                  |               |  | L               | ļ  |  |                    | \$15,001-\$50,000 \( \leq \) \$50,001-\$100,000 \( \leq \)                 | Current Year |                              | ļ       |
|           |    |                    |              |  |                  | <u> </u>   |              |                |                  |               | <u> </u>   |                 |  |  |                    |  | ia i         |                              |         |
|           |    |                    |              |  | ļ                | <u> </u>   |              |                |                  |               |  | _               | <u> </u>   | -  |                    | \$100,001-\$1,000,000 ヌ  | -            |                              | 1       |
| <u> </u>  |    |                    | <u> </u>     |  |                  |  |              |                |                  |               |  |                 | <u> </u>   |  |                    | \$1,000,001-\$5,000,000 ×  |              | Amount of Income             | j       |
| <b> </b>  |    |                    |              |  |                  | <u> </u>   | ļ            |                |                  |               |  | <u> </u>        | _  | <u>                                     </u>     |                    | Over \$5,000,000 ×   |              | ŭ                            | ᇤ       |
|           |    |                    | _            |  |                  | <del>                                     </del> |              |                |                  |               | <u> </u>   |                 | <u> </u>   |  | Щ                  | Spouse/DC Income over \$1,000,000*   | 4            | <u> </u>                     | BLOCK D |
|           | 4  |                    |              |  | <u></u>          | _  |              | <b>Δ</b> λ     |                  | Æ√            | 0.1  |                 | NA.  | <b>(2)</b>                                       |                    | None –   | ı            | ď.                           | ê       |
|           |    | , CO <sub>2</sub>  | ر<br>ک       | <b>8</b> 37<br>(2)                               |                  |  | <b>e</b> 1   | 8              | Z) \             | <u>හ</u>      | O  |                 | Ø  |  |                    | \$1-\$200 =<br>\$201-\$1,000 =   | }            | Ä                            | 1       |
| $\vdash$  |    | 0                  | S            | $\odot$  |                  | <u>(%)</u>                                       | Ø            |                | <b>(X</b> )      |               | <u> </u>   |                 |  | -  |                    | \$1,001,\$2,500  |              | Õ                            |         |
| <b>  </b> |    |                    |              |  |                  | <u> </u>   |              |                |                  | -             |  | _               | <del> </del>                                     |  |                    | \$2,501-\$5,000  | Pre          |                              |         |
|           |    |                    |              |  |                  | _  |              | -              |                  | <u> </u>      |  | <del> </del>    |  |  |                    | \$5,001-\$15,000 ≤   | Preceding    |                              |         |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 | <del>                                     </del> | -  |                    | \$15,001-\$50,000 \(\leq\)   | <b>#</b>     |                              | - [     |
|           |    |                    |              |  |                  | <u> </u>   |              |                |                  |               | -  |                 |  |  |                    | \$50,001-\$100,000 \(\geq\)  | Year         |                              | 1       |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 |  |  |                    | \$100,001-\$1,000,000 <del>=</del>   | 2            |                              | ١       |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 |  |  |                    | \$1,000,001-\$5,000,000 ×  |              |                              | -       |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 |  |  |                    | Over \$5,000,000   |              |                              | ]       |
|           |    |                    |              |  |                  |  |              |                |                  |               |  |                 |  |  |                    | Spouse/DC income over \$1,000,000° ≚                                       |              |                              | - [     |

|       | SCHEDULE A - ASSETS & "UNEARNED INCOME" |  |
|-------|---|--|
| Name: | Stewart I Levenson, MD                  |  |
| Page  | ٦<br>لا                                 |  |

| magn        | ANCEX Com Findenital | in Francisco | CW61x an any Worlde | CAIOX am Cop Inc Bud                             | AMCPX am anologie | HCN Welltower | VO) VILLE    | Y2 Venger    | VTR Ventos                                       | UPS UnJust Pagast | TOT TIXSA SOMEWA                                 | so Santon_Co | SNY South ADR                                    | 0 (besta) name  | SP,<br>DC, ASSET NAME EIF<br>JT |   |                  |                | Assets and/or income Sources | BLOCK A |
|-------------|----------------------|--------------|---------------------|--|-------------------|---------------|--------------|--------------|--|-------------------|--|--------------|--|-----------------|---------------------------------|---|------------------|----------------|------------------------------|---------|
| _           |                      | -            | \$                  | \$   |                   |               | ļ            |              |  |                   |  |              | 1  |                 |                                 | None  | -                | >              |                              |         |
|             |                      | -            | É                   |  |                   |               | $\top$       | 1            |  |                   | T  |              |  |                 |                                 | \$1-\$1,000   |                  |                |                              |         |
|             |                      |              |                     |  |                   | <             |              |              | <  | _ \               |  | 4            | <  | <               | •                               | \$1,001-\$15,000  |                  | o              |                              |         |
|             |                      | 1            | _                   |  |                   |               | <            | 1            |  |                   | <  |              |  |                 |                                 | \$15,001-\$50,000   |                  |                | 1                            |         |
|             | J                    | ·            | /                   | <u> </u>   | <                 |               | 1            |              |  |                   |  | Ţ            |  |                 |                                 | \$50,001-\$100,000  | г                | π              | [ ≲                          | ;       |
|             |                      |              |                     |  |                   |               |              |              |  |                   |  |              |  |                 |                                 | \$100,901-\$250,000   |                  | П              | Value of Asset               | p       |
|             |                      |              |                     |  |                   | <u> </u>      |              |              |  |                   |  |              |  | <u></u>         |                                 | \$250,001-\$500,000   |                  |                | <u>_</u>                     | BLOCK B |
|             |                      |              |                     |  |                   |               |              |              | ļ  |                   |  |              |  |                 |                                 | \$500,001-\$1,000,000   | _=               | Ι              | Ass                          | ω       |
|             |                      |              |                     |  |                   |               |              |              |  |                   |  |              | <u> </u>   | L.,             |                                 | \$1,000,001-\$5,000,000   |                  |                | <u> </u>                     |         |
|             |                      |              |                     | <u> </u>   | ļ                 |               |              | _            | _  |                   | ļ  |              |  |                 |                                 | \$5,000,001-\$25,000,000  |                  |                |                              |         |
|             |                      |              |                     | _  | -                 | ↓             | <u> </u>     | 1            | ļ .  | ļ                 | <u> </u>   | ļ            |  |                 |                                 | \$25,000,001-\$50,000,000   | -                | <u> </u>       | 1                            |         |
|             |                      |              |                     |  |                   |               | ļ            | ļ            | ļ  |                   | 1  |              |  | ļ               |                                 | Over \$50,000,000   |                  |                | 1                            |         |
|             |                      |              |                     | _  |                   | <del></del>   | ļ            | ļ            | _  |                   |  |              |  |                 |                                 | Spouse/DC Asset over \$1,000,000*                                       |                  | Ξ              |                              |         |
|             |                      |              |                     |  | <u> </u>          | ļ             |              |              | _  | _                 | <  | Ļ            |  |                 | ļ                               | NONE  |                  |                |                              |         |
| _           |                      | <u> </u>     | <u></u>             | <  | 4                 | , 스           | 4            |              | _  |                   | <u> </u>   | <            | _  | _               |                                 | DIVIDENDS   |                  |                |                              |         |
|             |                      |              |                     |  | ļ                 |               | <u> </u>     |              |  |                   | <u></u>  |              |  |                 |                                 | RENT  |                  |                | ₹                            |         |
|             |                      |              |                     |  |                   |               | 1            | <u> </u>     |  |                   |  |              | <u> </u>   |                 | l                               | INTEREST  |                  |                | 8                            | 四       |
|             |                      |              |                     |  |                   |               | <u></u>      |              |  |                   |  | <u>L</u>     |  |                 |                                 | CAPITAL GAINS   |                  |                |                              | BLOCK C |
|             |                      |              |                     |  |                   |               |              |              |  |                   |  |              |  |                 |                                 | EXCEPTED/BLIND TRUST  |                  |                | Type of Income               | Ô       |
|             |                      |              |                     |  |                   |               |              |              |  |                   |  |              |  |                 |                                 | TAX-DEFERRED  |                  |                | 3                            |         |
|             |                      |              |                     |  |                   |               |              |              |  |                   |  |              |  |                 |                                 | Other Type of Income (Specify: e.g., Partnership Income or Farm Income) |                  |                | Ì                            |         |
|             |                      |              |                     |  |                   |               |              |              |  | <                 | (  |              |  |                 |                                 | None  | -                |                | 1                            |         |
|             |                      |              |                     |  |                   |               |              |              |  |                   |  |              |  |                 |                                 | \$1-\$200   | =                |                |                              |         |
|             |                      |              | $\otimes$           |  |                   | 0             |              |              | 8  |                   |  |              |  | 8               |                                 | \$201-\$1,000   | ≡                |                |                              |         |
| 2           |                      | 2            |                     | 8)   | <u></u>           |               | 0            | 8            |  |                   |  | 8            | 8  | $\sum$          |                                 | \$1,001-\$2,500   | ₹                | _              |                              |         |
|             | 8                    |              |                     |  | 8                 | <u> </u>      |              |              |  |                   | ļ. <u>.</u>                                      |              |  |                 |                                 | \$2,501-\$5,000   | <                | Current Year   |                              |         |
|             |                      |              |                     |  |                   | ļ             | <u> </u>     |              |  |                   |  |              |  |                 |                                 | \$5,001-\$15,000  | ≤                | Ten            |                              |         |
|             |                      |              |                     |  |                   |               |              | _            |  |                   |  |              |  |                 |                                 | \$15,001-\$50,000   | ≦                | Ž              |                              |         |
|             |                      |              |                     |  |                   | 1             |              | <u> </u>     |  |                   |  |              |  | ļ               |                                 | \$50,001-\$100,000  |                  | är             | l                            |         |
|             |                      |              |                     | <u> </u>   |                   |               |              | <u> </u>     |  |                   |  | <u></u>      |  | igsquare        |                                 | \$100,001-\$1,000,000   | ×                |                |                              |         |
| ∤           |                      |              |                     | <u> </u>   | _                 |               | <u> </u>     |              |  |                   |  |              |  | $\vdash$        |                                 | \$1,000,001-\$5,000,000   | <u>×</u>         |                | 🧃                            |         |
|             |                      |              |                     | ļ  | ļ                 | ļ             |              |              |  |                   | <u> </u>   | _            |  | <u> </u>        |                                 | Over \$5,000,000  | _ <u>×</u>       |                | Š                            | В       |
|             |                      |              |                     |  |                   |               |              | -            |  | ^                 |  |              |  |                 |                                 | Spouse/DC Income over \$1,000,000*                                      | _ ≚              | Н              | ₫.                           | BLOCK D |
|             |                      |              |                     |  | <del> </del>      | <del> </del>  |              | -            | ļ  | ~                 | <b> </b>   |              |  |                 |                                 | None  |                  |                | ੂ ਵ                          | ô       |
|             |                      | Z            | <b>∕\$</b> `\       | -  |                   | (X)           |              |              | ළ  | ļ                 | <del> </del>                                     |              | <b>108</b>                                       | NA.             |                                 | \$1-\$200   | _ <del>=</del> - |                | Amount of Income             |         |
|             |                      | න            | لات                 | 8  |                   | צי            | 8            | BRI          | ٧  |                   | <u> </u>   | <u>&amp;</u> | <u> </u>   | $ \mathcal{O} $ |                                 | \$201-\$1,000<br>\$1,001-\$2,500  |                  |                | र्क                          |         |
|             | 29                   |              |                     | יכי  | <del> </del>      | <del> </del>  | $\sim$       | J            | -  |                   | -  | ٧            |  |                 |                                 | \$2,501-\$5,900   | ~                | Pre            |                              |         |
| <b>(2</b> ) | 7                    |              |                     | -  | (8)               | <del> </del>  | -            |              | -  |                   | <del>                                     </del> | <del> </del> |  |                 |                                 | \$5,001-\$15,000  | <u></u>          | Cec            |                              |         |
| لاي         |                      |              |                     | <del>                                     </del> | ٧                 |               | <del> </del> | <del> </del> | <del>                                     </del> |                   | $\vdash$   | <del> </del> | <del>                                     </del> |                 |                                 | \$15,001-\$50,000   | _ <u>-</u>       | Preceding Year | Į .                          |         |
|             |                      |              |                     | _  |                   |               |              | <u> </u>     |  |                   |  |              | <del> </del>                                     |                 |                                 | \$50,001-\$100,000  |                  | آخ<br>ا        |                              |         |
| $- \dagger$ |                      |              |                     |  |                   |               | -            | <u> </u>     |  |                   |  |              |  |                 |                                 | \$100,001-\$1,000,000   | _ <del>_</del> _ | ar             |                              |         |
|             |                      |              |                     | _  | †                 | -             |              |              |  |                   |  |              |  |                 |                                 | \$1,000,001-\$5,000,000   | ×                |                |                              |         |
|             |                      |              |                     |  | +                 | +             |              | -            | ⊢—   | —                 | <del> </del>                                     |              |  |                 |                                 |   |                  |                | E                            |         |
|             |                      |              |                     |  |                   |               |              |              | 1  | ļ                 |  |              |  |                 |                                 | Over \$5,000,000  | ≚                |                |                              |         |

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Name:

Stewart I Levenson, MD

Page 6

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|---|---|---|---|---|---|----------|--------------|--------------|--------------|--------------|----------|--------------------|------------------|---------------|------------|--|----------|--------------|--|------------------------------|
|   |   |   |   |   |   |          |              |              |              |              |          | SMCWX am Smoll com | AMAMX answer mit | AMECK amlacto | ASSET NAME |  |          |              | Sacra elluivi Incolle opplices                   | Assets and/or income Sources |
|   |   |   |   |   |   |          | ļ            |              |              |              | +        | <u>*</u>           | <b>~</b> ○       |               | 4          |  | _        |              |  |                              |
|   | , | ļ | ļ |   |   |          |              |              |              | +            | ٠.       | _                  | —                | ļ             |            | None   |          | •            |  |                              |
|   |   |   |   |   |   |          |              |              |              | _            |          |                    |                  |               |            | \$1-\$1,000  |          |              |  |                              |
|   |   |   | ļ | ļ |   |          | ļ            | <u> </u>     | ┼            | _            | +        | 1                  | +                | +             |            | \$1,001-\$15,000   |          | ٥            |  |                              |
|   |   |   |   |   |   |          | ļ            | <del> </del> | <u> </u>     | -            | 4-       | <del> `</del>      | <b>&gt;</b> -    |               |            | \$15,001-\$50,000  |          | •<br>•       |  | _                            |
|   |   |   |   |   |   |          |              | -            | 1            | +            | -        | —                  | —                | 1             |            | \$50,001-\$100,000   |          | 71           |  | <u> </u>                     |
|   |   |   |   |   |   |          | ļ            | ļ            | ļ            | <u> </u>     | 1        |                    | _ <              | ۲             |            | \$100,001-\$250,000  |          | П            | 1  | Ę                            |
|   |   |   |   |   |   |          |              | <u> </u>     | <u> </u>     | 1            | +        | <del></del> -      | ₩                |               |            | \$250,001-\$500,000  |          | )<br>        | 1 5  | BLOCK B                      |
|   |   |   |   |   |   |          |              | ļ            | _            | $\bot$       | $\perp$  | —                  | ₩                | 1             |            | \$500,001-\$1,000,000  |          | E            |  | -                            |
|   |   |   |   |   |   |          |              | ļ            | ļ            | ļ            | -        |                    |                  | ļ             |            | \$1,000,001-\$5,000,000  |          |              | , 2  | •                            |
|   |   |   |   |   | ļ |          | ļ            | ļ            |              | ╁            | -        |                    | —                |               |            | \$5,000,001-\$25,000,000   | •        |              |  |                              |
|   |   |   |   |   |   |          |              |              | -            | +            | +        | $\bot$             | +                |               |            | \$25,000,001-\$50,000,000  |          | <u> </u>     | ł  |                              |
|   |   |   |   |   |   |          |              |              | -            |              |          | —                  | -                |               |            | Over \$50,000,000  |          |              | 1  |                              |
|   |   |   |   |   |   | <u> </u> |              | <del> </del> | +            | +-           | +-       | +-                 | +                | +             | _          | Spouse/DC Asset over \$1,000,000*  |          | _            | <del>                                     </del> |                              |
|   |   |   |   |   |   |          |              | ļ            | -            | +            |          |                    | +                |               |            | NONE   |          |              | ł  |                              |
|   |   |   |   |   |   |          |              | -            | <del> </del> | -            | -        | <b>↓</b>           | _ `              | _ <           |            | DIVIDENDS  |          |              |  |                              |
|   |   |   |   |   |   |          |              | <u> </u>     | 1            | _            | +        |                    | ┷                | 1             |            | RENT   |          |              | 3  | 7                            |
|   |   |   |   |   |   |          |              |              |              |              |          |                    |                  |               |            | INTEREST   |          |              | Type of income                                   |                              |
|   |   |   |   |   |   |          |              |              |              |              |          | ᆚ                  |                  |               |            | CAPITAL GAINS  |          |              | ] }  | BLOCKC                       |
|   |   |   |   |   |   |          |              |              |              |              |          |                    |                  |               |            | EXCEPTED/BLIND TRUST   |          |              | 3  | Ö                            |
|   |   |   |   |   |   |          |              |              |              |              |          |                    |                  |               |            | TAX-DEFERRED   |          |              |  | 3                            |
|   |   |   |   |   |   |          |              |              |              |              |          |                    |                  |               |            | Other Type of Income (Specify: e.g.,<br>Partnership Income or Farm Income) |          |              |  |                              |
|   |   |   |   |   |   |          |              |              |              |              |          |                    | 1                |               |            | None   | -        |              |  |                              |
|   |   |   |   |   |   |          |              |              |              |              |          |                    |                  |               |            | \$1-\$200  | =        |              |  |                              |
|   |   |   |   |   |   |          |              |              |              |              |          |                    |                  |               |            | \$201-\$1,000  | =        | ŀ            |  |                              |
|   |   |   |   |   |   |          |              |              |              |              |          | 0                  |                  | 8             |            | \$1,001-\$2,500  | 7        |              |  |                              |
|   |   |   |   |   |   |          |              |              |              |              |          |                    |                  |               |            | \$2,501-\$5,000  | <        | ဥ            |  |                              |
|   |   |   |   |   |   |          |              |              |              |              |          |                    |                  | <u> </u>      |            | \$5,001-\$15,000   | ≤        | Current Year |  |                              |
|   |   |   |   |   |   |          |              |              |              |              |          |                    | lacksquare       |               |            | \$15,001-\$50,000  | ≦        | ıτΥ          | •  |                              |
|   |   |   |   |   |   |          |              |              |              |              |          | <u> </u>           |                  |               |            | \$50,001-\$100,000   | ≦        | Bar          |  |                              |
|   |   |   |   |   |   |          |              |              |              | _            | $\perp$  |                    |                  |               |            | \$100,001-\$1,000,000  | ×        |              |  |                              |
|   |   |   |   |   |   |          |              | ļ            | ļ            | ļ            | <u> </u> |                    |                  | ļ             |            | \$1,000,001-\$5,000,000  | <u>×</u> |              | ļ  | •                            |
|   |   |   |   |   |   |          |              | _            | 1            | -            | _        | <u> </u>           | <del> </del>     |               | <u> </u>   | Over \$5,000,000   | <u>×</u> |              | Amount of income                                 | ρū                           |
|   |   |   |   |   |   |          | ļ            | <u> </u>     |              | <del> </del> | -        | ┿                  | <del> </del>     | 1             | ļ          | Spouse/DC Income over \$1,000,000*   | ĕ        | L            | وَّ وَ   | BLOCK D                      |
|   |   |   |   |   |   |          |              | _            | _            | -            | +        | +                  | —                |               |            | None   |          |              | ž  | Ö                            |
|   |   |   |   |   |   |          |              |              | 1            | -            | +        | +                  | 1                |               |            | \$1-\$200  | =        |              | Š  |                              |
| . |   |   |   |   |   |          | <u> </u>     | <del> </del> | <del> </del> | 1            | -        | 257                | <del> </del>     | O             |            | \$201-\$1,000  | =        |              |  |                              |
|   |   |   |   |   |   |          | <u> </u>     | $\vdash$     | $\vdash$     | +            | -        | 8                  | +                | 8             | $\vdash$   | \$1,001-\$2,500  | 7        | ים<br>ב      |  |                              |
|   |   |   |   |   |   |          |              | $\vdash$     | +            | +            |          | +                  | Ø                |               |            | \$2,501-\$5,000<br>\$5,001-\$15,000  | <<br><   | Preceding    |  |                              |
| - |   |   |   |   |   |          | -            | ┼            | <del> </del> | +            | +        |                    | 10               | <u> </u>      | <b> </b>   | \$5,001-\$15,000<br>\$15,001-\$50,000                                      | <u> </u> | di           |  |                              |
|   |   |   |   |   |   |          |              | <del> </del> | +            | -            | +        | +                  | <del> </del>     | <del> </del>  |            | \$15,001-\$30,000<br>\$50,001-\$100,000                                    | <u>2</u> | Ϋ́           |  |                              |
|   |   |   | - |   | - |          | <del> </del> | -            | ┼            |              | +-       | +                  | +                | <del> </del>  |            | \$100,001-\$1,000,000  | ×        | Year         |  |                              |
|   |   |   |   |   |   |          |              | -            | +            | +            | +-       | +                  | +                |               |            | \$1,000,001-\$5,000,000  | ×        |              |  |                              |
|   |   |   |   |   |   |          |              | <del> </del> | -            | +            |          |                    | +                | <del> </del>  | <b></b>    |  |          |              | Ì  |                              |
|   |   |   | 1 |   |   |          | l            |              | 1            |              | - 1      |                    |                  |               |            | Over \$5,000,000   | ≥        |              |  |                              |

### SCHEDULE C - EARNED INCOME

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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 reporting period. For both the filer and filer's spouse, list the source and amount of any honoraria. List only the source for other spouse earned income exceeding \$1,000. See examples below.

INCOME LIMITS and PROHIBITED INCOME: Be advised that the income limit and prohibited income may apply to you after you are on House payroll. The 2016 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,495. The 2017 limit is \$27,765. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff. **EXCLUDE**: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

|  |  |  |  |  | Paly employed by US Govir VA   | Ontario County Board of Education | Examples: State of Maryland | ABC Trade Association, Baltimore, MD (July 15) | Source (include date of receipt for honoraria) |        |
|--|--|--|--|--|--|-----------------------------------|-----------------------------|--|--|--------|
|  |  |  |  |  | The state of the s | Spouse Salary                     | Salary                      | Honorarium                                     | Type   | :      |
|  |  |  |  |  |  | N/A                               | \$20,000                    | \$   | Current Year to Filing                         | Am     |
|  |  |  |  |  |  | N/A                               | \$76,000                    | \$500  | Preceding Year                                 | Amount |

#### SCHEDULE D - LIABILITIES

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|---|-----------|
|   | Name:     |
|   | Page of 9 |
|   |           |

period. New Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting exceeded \$10,000. liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and \*Column K is for liabilities held solely by your spouse or dependent child.

|  |  |  |  | DC, JT                                     |    |                     |
|--|--|--|--|--|----|---------------------|
|  |  |  | Example                                |  |    |                     |
|  |  |  | First Bank of Wilmington, DE           | Creditor                                   |    |                     |
|  |  |  | 5/98                                   | Date<br>Liability<br>Incurred<br>MO/YR     |    |                     |
|  |  |  | Mortgage on Rental Property, Dover, DE | Type of Liability                          |    |                     |
|  |  |  |  | \$10,001-<br>\$15,000                      | >  |                     |
|  |  |  |  | \$15,001-<br>\$50,000                      | 83 |                     |
|  |  |  |  | \$50,001-<br>\$100,000                     | Ö  |                     |
|  |  |  | ×                                      | \$100,001-<br>\$250,000                    | 0  |                     |
|  |  |  |  | \$250,001-<br>\$500,000                    | m  | moun                |
|  |  |  |  | \$500,001-<br>\$1,000,000                  | 71 | Amount of Liability |
|  |  |  |  | \$1,000,001-<br>\$5,000,000                | ဖ  | ability             |
|  |  |  |  | \$5,000,001-<br>\$25,000,000               | I  |                     |
|  |  |  |  | \$25,000,001-<br>\$50,000,000              | -  |                     |
|  |  |  |  | Over \$50,000,000                          | c  |                     |
|  |  |  |  | Over \$1,900,000*<br>(Spouse/DC Liability) | *  |                     |

#### SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude**: Positions held in any religious, social, fratemal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. **New Members and second-year candidates** report positions held in the reporting period and the current calendar year. First-year candidates and new employees report positions held in the current calendar year and two previous years.

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

#### **SCHEDULE F - AGREEMENTS**

|  | Name:  | Page of A             |
|--|--|-----------------------|
|  |  |                       |
| agreement or arrangement that you have with re | agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government s          | f government service; |
| rrent employer other than the U.S. government: | trent employer other than the U.S. government: or continuing participation in an employee welfare or benefit plan maintained by a former | intained by a former  |

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

| Date | Parties to Agreement | Terms of Agreement |
|------|----------------------|--------------------|
|      |                      |                    |
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# SCHEDULE J - COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Report sources of compensation received by you or your business affiliation for services provided directly by you during the current year and two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule C.

| government and any information considered confidential as a result of a privileged relationship recognized by law. Lio not repeat | privileged relationship recognized by law. Do not repeat information listed on Schedule C. |
|---|--|
| Source (Name and City/State)  | Brief Description of Duties  |
| Example: Doe Jones & Smith, Hometown, Homestate   | Accounting Services  |
| DartmonthHitchcock annulities   | 400 HS 25.18   |
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|  |  |  |  |  |  | ST VENTS | EXCLUDES EAGNED INCOME FROM US GOVT - employed by US soit Best of VA | NOTES          |