

UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

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For use by Members, officers, and employees

HAND DELIVERED

William Franklin Shuster

(Full Name)

202-225-2431

(Daytime Telephone)

LEGISLATIVE RESOURCE CENTER
2009 MAY 15 PM 5:00
(Office Use Only)

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

State: PA District: 09

☐ Officer Or Employee

Employing Office:

Report Type

☒ Annual (May 15)

☐ Amendment

☐ Termination

Termination Date:

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

PRELIMINARY INFORMATION -- ANSWER EACH OF THESE QUESTIONS

I. Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period? If yes, complete and attach Schedule I.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$335 and not otherwise exempt)? If yes, complete and attach Schedule VI.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
II. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article in the reporting period? If yes, complete and attach Schedule II.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$335 from one source)? If yes, complete and attach Schedule VII.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
III. Did you, your spouse, or a dependent child receive "unearned" income of more than \$200 in the reporting period or hold any reportable asset worth more than \$1,000 at the end of the period? If yes, complete and attach Schedule III.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year? If yes, complete and attach Schedule VIII.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
IV. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period? If yes, complete and attach Schedule IV.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule IX.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period? If yes, complete and attach Schedule V.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.	

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION -- ANSWER EACH OF THESE QUESTIONS

Trusts-- Details regarding "Qualified Blind Trusts" approved by the Committee on Standards of Official Conduct and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Exemptions-- Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Standards of Official Conduct.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

SCHEDULE I - EARNED INCOME

Name William Franklin Shuster

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

Source	Type	Amount
Blair Family Solutions, Inc.	Spouse's Salary	N/A
Acercare Hospice	Spouse Salary	N/A

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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BLOCK A Asset and/or Income Source		BLOCK B Year-End Value of Asset	BLOCK C Type of Income	BLOCK D Amount of Income	BLOCK E Transaction
<p>Identify (a) each asset held for investment or production of income with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other assets or sources of income which generated more than \$200 in "unearned" income during the year. For rental property or land, provide a complete address. Provide full names of stocks and mutual funds (do not use ticker symbols). For all IRAs and other retirement plans (such as 401(k) plans) that are self directed (i.e., plans in which you have the power, even if not exercised, to select the specific investments), provide the value and income information on each asset in the account that exceeds the reporting threshold. For retirement plans that are not self-directed, name the institution holding the account and its value at the end of the reporting period. For an active business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. For additional information, see the instruction booklet.</p> <p>Exclude: Your personal residence(s) (unless there is rental income); any debt owed to you by your spouse, or by your or your spouse's child, parent or sibling; any deposits totaling \$5,000 or less in personal savings accounts; any financial interest in or income derived from U.S. Government retirement programs.</p> <p>If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC) or is jointly held (JT), in the optional column on the far left.</p>		<p>at close of reporting year. If you use a valuation method other than fair market value, please specify the method used. If an asset was sold and is included only because it is generated income, the value should be "None."</p>	<p>Check all columns that apply. For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA". For all other assets including all IRAs, indicate the type of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if asset did not generate any income during the calendar year.</p>	<p>For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, including all IRAs, indicate the category of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if no income was earned or generated.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
	5 S LLC-General Partner of Shuster Family Limited Partnership	\$1,001 - \$15,000	RENT and Interest Income	\$1 - \$200	
DC	Alliance CBF Age Based Aggressive 1987-1989 Port CLS CX M/F	\$15,001 - \$50,000	None	NONE	S(part)
DC	Alliance CBF Age Based Aggressive 1990-1992 Port CLS CX M/F	\$15,001 - \$50,000	None	NONE	
	Blairmont Club LLC	\$1,001 - \$15,000	Other: PARTNERSHIP	NONE	
	Congressional Federal Credit Union	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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JT	M & T Bank #3471	\$1 - \$1,000	INTEREST	\$1 - \$200	
JT	M & T Bank #8361	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
JT	M & T Bank 6538	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
SP	M & T Bank Certificate of Deposit #9557	\$1,001 - \$15,000	INTEREST	\$201 - \$1,000	
DC	M & T Bank Certificates of Deposit	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
DC	M & T Bank Savings	\$1 - \$1,000	INTEREST	\$1 - \$200	
JT	M & T Bank Checking #2383	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
DC	S & T Bank Certificates of Deposit #001 to #003	\$1,001 - \$15,000	INTEREST	\$201 - \$1,000	
	S2 & L2 Partnership East Freedom, PA.	\$500,001 - \$1,000,000	RENT/INTEREST	\$50,001 - \$100,000	
	SEI Core Fixed Income Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	PS(part)
	SEI Emerging Markets Debt Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	SEI Emerging Markets Equity Fund	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	P
	SEI High Yield Bond Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	SEI International Equity Fund	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	PS(part)

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	SEI International Fixed Income Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	SEI Large Cap Growth Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	SEI Large Cap Value Fund	\$1,001 - \$15,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	
	SEI PA Municipal Bond Fund	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	PS(part)
	SEI Prime Obligation Fund	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
	SEI Small Cap Growth Fund	\$1,001 - \$15,000	DIVIDENDS	NONE	
	SEI Small Cap Value Fund	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	PS(part)
	SEI Tax Free Fund	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
	SEI Tax Managed Large Cap	\$15,001 - \$50,000	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	P
	SEI Tax Managed Small Cap	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Shuster Family Limited Partnership Formerly Shuster Rentals	\$100,001 - \$250,000	RENT and Interest Income	\$201 - \$1,000	
JT	UBS Cash Fund	None	DIVIDENDS	NONE	

SCHEDULE IV - TRANSACTIONS

Name William Franklin Shuster

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Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transaction
DC	Alliance CBF Aggressive Growth Emp Port 1987-1989	S(part)	3 times	\$15,001 - \$50,000
	SEI Core Fixed Income Fund	PS(part)	39 times	\$1,001 - \$15,000
	SEI Emerging Markets Equity Fund	P	11 times	\$1,001 - \$15,000
	SEI International Equity Fund	PS(part)	10 times	\$1,001 - \$15,000
	SEI PA Municipal Bond Fund	PS(part)	26 times	\$1,001 - \$15,000
	SEI Tax Managed Large Cap	P	10 times	\$1,001 - \$15,000

SCHEDULE V - LIABILITIES

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or dependent child. Mark the highest amount owed during the year. Exclude: Any mortgage on your personal residence (unless all or part of it is rented out); loans secured by automobiles, household furniture, or appliances; and liabilities owed to a spouse, or the child, parent, or sibling of you or your spouse. Report "revolving charge accounts" (i.e., credit cards) only if the balance at the close of the preceding calendar year exceeded \$10,000.

SP, DC, JT	Creditor	Type of Liability	Amount of Liability
	Congressional Federal Credit Union Visa	Credit Card Debt	\$15,001 - \$50,000

SCHEDULE VII - TRAVEL PAYMENTS AND REIMBURSEMENTS

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

Source	Date(s)	Point of Departure-- Destination--Point of Return	Lodging? (Y/N)	Food? (Y/N)	Was a Family Member Included? (Y/N)	Days not at sponsor's expense
General Marshall Fund of the United States and the Robert BorshFoundation	Feb 12-17	DC-Berlin Germany- Oberbyen Germany-DC	Y	Y	Y	None

FOOTNOTES

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Number	Section / Schedule	Footnote	This note refers to the following item
1	Schedule III	<p>S2 & L2 ownership represents a 60% interest in the following assets and liabilities:</p> <p>a. Cash - \$105,548</p> <p>b. Commercial real estate RD 1 Box 316-D East Freedom, PA 16637 (rented to Thomas Holding Co for auto dealership) \$1,600,000 to \$1,700,000 based on current appraisal.</p> <p>c. Mortgage and other debt - \$576,533</p> <p>d. Other Liabilities - \$1,162</p>	S2 & L2 Partnership East Freedom, PA

2	Schedule III	<p>The interest in the Shuster Family Limited Partnership is comprised of a 19.8% in the following assets:</p> <p>a. Cash in checking and savings - \$92,215</p> <p>b. Prepaid expenses - \$3,006</p> <p>c. Family farm and rental residence located at 825 Ritchey Road, Everett, PA 15537 (approx 100 acres) - \$500,000 - \$1,000,000</p> <p>d. Amount due to rental agent - \$47,597</p>	Shuster Family Limited Partnership
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FOOTNOTES

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Number	Section / Schedule	Footnote	This note refers to the following item
3	Schedule III	<p>5S LLC is the general partner in the Shuster Family Limited Partnership of which 20% is owned by William F. Shuster. The following are the assets and liabilities of the company:</p> <p>a. Advances made on behalf of clients - \$47,597</p> <p>b. Cash - \$514</p> <p>c. Investment in Shuster Family Limited Partnership \$5,000 - \$10,000</p>	5S LLC
4	Schedule III	The Blairmont Club LLC is a private dining club with book value net worth of \$13,050 of which William F. Shuster owns 2%.	The Blairmont Club LLC
5	Schedule III	Represents 529 plan for college age dependent child - \$18,900 withdrawn for qualified educational expenses.	Alliance CBF Age Based Aggressive 1987-1989 Port