

CHARLES W. BOUSTANY, JR., MD
3RD DISTRICT, LOUISIANA

COMMITTEE ON WAYS AND MEANS
SUBCOMMITTEES:
CHAIRMAN ON OVERSIGHT
TRADE
HUMAN RESOURCES



Congress of the United States

House of Representatives
Washington, DC 20515-1803

June 18, 2014

The Honorable Karen L. Haas
Clerk of the U.S. House of Representatives
Legislative Resource Center
B-106 Cannon House Office Building
Washington, D.C. 20515

Dear Ms. Haas,

Please accept this amendment to my 2013 Financial Disclosure Statement.

The following attachment was missing from the section "Schedule A. Assets & "Unearned" Income" in the original submission.

Attachment: Page 3 of the National Financial Services documentation, indicating the total of the "tilted balance" account.

Please find the attachment enclosed for inclusion as an amendment to my 2013 Financial Disclosure Statement. Should you require additional information, please contact my office at (202) 225-2031.

Sincerely,

Charles W. Boustany, Jr., M.D.
Member of Congress

WASHINGTON, DC OFFICE:

HAND DELIVERED

1115 CONGRESS HOUSE OFFICE BUILDING
WASHINGTON, DC 20515
(202) 225-2031

LAFAYETTE DISTRICT OFFICE:

LEGISLATIVE RESOURCE CENTER
LAFAYETTE STREET
SUITE 1400
LAFAYETTE, LA 70501
(337) 235-6322

OFFICE OF THE CLERK U.S. HOUSE OF REPRESENTATIVES

LAKE CHARLES DISTRICT OFFICE:
LAKE CHARLES, LA 70629
SUITE 1775
LAKE CHARLES, LA 70629
(337) 433-1747

Holdings by Investor



Bridget E Boustany
P O Box 80218
Lafayette, LA 70598

Lisa L Heath CFP
Certified Financial Planner
Financial Partners of Louisiana
935 Camellia Blvd
Suite 200
Lafayette, LA 70508
337-265-2500

Combined Account Portfolio
Date: 12/31/2013
Created: 04/24/2014

| Asset Name | Ticker | Asset Type | Asset Name | Quantity | Price (\$) | Value (\$) |
|-------------------------------|--------|--------------|----------------------|----------|------------|--------------|
| PIMCO UNCONSTRAINED BOND D | PUBDX | FIXED INCOME | PIMCO FUNDS - RETAIL | 2,876.95 | 11.09 | 31,905.32 |
| SSGA EMERGING MARKETS I | SSEMXX | EQUITY | SSGA FUNDS | 193.71 | 17.75 | 3,438.41 |
| TOUCHSTONE SANDS CAP SEL GR Z | PTSGX | EQUITY | TOUCHSTONE FUNDS | 228.14 | 17.47 | 3,985.55 |
| Account Total: | | | | | | \$152,580.70 |

Acct Name: CHARLES AND BRIDGET BOUSTANY:

Joint-Equity-tilted Balanced

Acct Type: Joint - Tenants In Common

Managed Account Type: EQUITY TILTED BALANCED PORTFOLIO

Program: CAAP LITMAN GREGORY ASSET MANAGEMENT

| Asset Name | Ticker | Asset Type | Asset Name | Quantity | Price (\$) | Value (\$) |
|---|--------|---------------------|----------------------|----------|------------|------------|
| AQR FDS DVRSF ARBTG N | ADANX | ALTERNATIVE | AQR FUNDS | 425.89 | 10.86 | 4,622.94 |
| ARBITRAGE FUND (THE) - RETAIL | ARBFX | ALTERNATIVE | ARBITRAGE FUNDS | 369.89 | 12.60 | 4,660.58 |
| BANK DEPOSIT SWEEP PROGRAM | QPRMQ | CASH OR EQUIVALENTS | | 3,405.80 | 1.00 | 3,405.80 |
| BARON EMERGING MARKETS FUND | BEXFX | EQUITY | BARON FUNDS | 1,019.18 | 11.54 | 11,761.33 |
| BBH FD INC CORE SL RETAIL | BBTRX | EQUITY | BBH FUNDS | 657.49 | 13.96 | 9,178.62 |
| CLIPPER FUND | CFIMX | EQUITY | CLIPPER FUNDS | 110.00 | 92.07 | 10,128.07 |
| DOUBLELINE TOTAL RETURN BOND FUND CLASS N | DLTNX | FIXED INCOME | DOUBLELINE FUNDS | 545.32 | 10.78 | 5,878.55 |
| EATON VANCE STRCTD EMERGING MKT A | EAEMX | EQUITY | EATON VANCE | 475.23 | 14.84 | 7,052.47 |
| FMI LARGE CAP FUND | FMIHX | EQUITY | FIDUCIARY FUNDS | 556.29 | 20.86 | 11,604.17 |
| HARBOR CAPITAL APPRECIATION INV | HCAIX | EQUITY | HARBOR FUNDS | 125.60 | 55.75 | 7,001.98 |
| HARBOR INTERNATIONAL INV | HIINX | EQUITY | HARBOR FUNDS | 140.71 | 70.33 | 9,895.78 |
| LAZARD INTL STRATEGIC EQTY PRT OPEN | LISOX | EQUITY | LAZARD FUNDS | 628.94 | 14.57 | 9,163.66 |
| LOOMIS SAYLES BOND FUND RETAIL CLASS | LSBRX | FIXED INCOME | LOOMIS SAYLES FUNDS | 458.73 | 15.09 | 6,922.25 |
| OAKMARK FUND (THE) I | OAKMX | EQUITY | OAKMARK FUNDS | 133.96 | 63.63 | 8,523.94 |
| OAKMARK GLOBAL SELECT FUND CLASS I | OAKWX | EQUITY | OAKMARK FUNDS | 893.85 | 16.51 | 14,757.48 |
| PIMCO EMERGING LOCAL BOND D | PLBDX | FIXED INCOME | PIMCO FUNDS - RETAIL | 948.04 | 9.33 | 8,845.23 |
| PIMCO TOTAL RETURN D | PTTDX | FIXED INCOME | PIMCO FUNDS - RETAIL | 1,153.43 | 10.69 | 12,330.19 |
| PIMCO UNCONSTRAINED BOND D | PUBDX | FIXED INCOME | PIMCO FUNDS - RETAIL | 1,547.19 | 11.09 | 17,158.35 |