



Filing ID #10002389

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Mrs. Jackie Walorski
Status: Member
State/District: IN02

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2013
Filing Date: 05/14/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
City of Mishawaka School - Security Benefit Fixed Account	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Firefighters Credit Union	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Great American Financial Resources Annuity	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Indiana Public Retirement System (INPRS) Legislators' Defined Contribution Fund ⇒ Consolidated Retirement Investment Fund		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Indiana Public Retirement System (INPRS) Legislators' Defined Contribution Fund ⇒ Large Cap Equity Index Fund		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Indiana Public Retirement System (INPRS) Legislators' Defined Contribution Fund ⇒ Money Market		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Indiana Public Retirement System (INPRS) Legislators' Defined Contribution Fund ⇒ Small/Mid Cap Equity Fund		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
INPRS Teachers Retirement Fund (TRF) - Guaranteed Fund	SP	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
MetLife ⇒ Fixed Interest	SP	\$1 - \$1,000	Tax-Deferred	None	<input type="checkbox"/>
MetLife ⇒ Stock Index	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
TIAA-CREF ⇒ CREF Growth		\$15,001 - \$50,000	None		<input type="checkbox"/>
TIAA-CREF ⇒ CREF Stock		\$15,001 - \$50,000	None		<input type="checkbox"/>
TIAA-CREF ⇒ TIAA Traditional		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>

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

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Mishawaka School Corporation	Spouse Salary	N/A
Bethel College	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	First Federal Savings Bank (Rochester, IN)	May 2008	Mortgage on personal residence	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Founder	Impact International, Inc.

Position	Name of Organization
COMMENTS: Inactive 501(c)(3) organization.	

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details				Inclusions		
Source	Start Date	End Date	Itinerary	Lodging?	Food?	Family?
American-Israel Education Foundation	08/12/2013	08/18/2013	Washington, DC - Tel Aviv, Israel - Washington, DC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"> ◦ Indiana Public Retirement System (INPRS) Legislators' Defined Contribution Fund ◦ MetLife (Owner: SP) ◦ TIAA-CREF

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

COMMENTS

A letter from an Investment Advisor Representative will be filed with the Ethics Committee under separate cover. It notes that a transfer of all INRPS and TIAA-CREF funds to an IRA was initiated on 12/30/13, but not completed until 1/14. As such, the change in assets will be reported on the 2014 Financial Disclosure Report.

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Mrs. Jackie Walorski , 05/14/2014