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SUBCOMMITTEES:

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RESEARCH AND TECHNOLOGY

**Congress of the United States**  
**House of Representatives**  
Washington, DC 20515-3701

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U.S. HOUSE OF REPRESENTATIVES

HAND  
DELIVERED

May 25, 2017



The Honorable Karen L. Haas  
Clerk of the U.S. House of Representatives  
U.S. Capitol  
Room H-154  
Washington, DC 20515

Dear Ms. Haas,

While preparing my 2016 Financial Disclosure Report, I noticed an inadvertent error regarding my personal IRA and discovered that it was reported incorrectly on previous reports. I immediately contacted the Ethics Committee to make note of the error and I am offering this letter to update my records with the amendments below under Schedule A. I regret this mistake and I appreciate the opportunity to correct my past Financial Disclosure Reports. I take these reports very seriously and it is always my goal to provide complete and accurate information.

**Franklin Growth Alloc. CLA mutual fund**

In December 2010, my husband, Michael Simon, and I each purchased personal shares of the "Franklin Templeton Growth Allocation mutual fund" for our respective IRA accounts. In my first Financial Disclosure Report as a Member of Congress in 2012, these shares were incorrectly reported as assets I shared jointly with Michael. In 2013, the holding was again disclosed; however, my shares were inadvertently included as one of Michael's personal assets. In 2014, Michael sold his personal shares and I kept mine; however, my report for 2014 incorrectly states that all shares of "Franklin Templeton Growth Allocation mutual fund" were sold. In 2015, the "Franklin Templeton Growth Allocation mutual fund" is inadvertently omitted from my Financial Disclosure Report.

The assets described above were filed in years 2012 – 2015 as:

Year	Asset	Account	Owner	Value of Asset	Income Type	Income Amt.
2012	Franklin Templeton Growth Allocation mutual fund	Ameriprise Managed Asset Account	Jointly Owned	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
2013	Franklin Templeton Growth Allocation mutual fund	Michael H. Simon Beneficiary IRA at Ameriprise	Michael H. Simon	\$50,001 - \$100,000	Dividends	\$1 - \$200
2014	Franklin Templeton Growth Allocation mutual fund	Michael H. Simon Beneficiary IRA at Ameriprise	Michael H. Simon	"None"	Capital Gains / Dividends	\$1 - \$200
2015	N/A; None Disclosed	N/A	N/A	N/A	N/A	N/A

The same filings should be amended for 2012 – 2015 and reported as:

Year	Asset	Account	Owner	Value of Asset	Income Type	Income Amt.
2012	Franklin Templeton Growth Allocation mutual fund	Michael H. Simon Beneficiary IRA at Ameriprise	Michael H. Simon	\$15,001 - \$50,000	Dividends	\$1 - \$200
2012	Franklin Growth Alloc. CLA mutual fund	Suzanne Bonamici IRA at Ameriprise	Suzanne Bonamici	\$15,001 - \$50,000	Dividends	\$1 - \$200
2013	Franklin Templeton Growth Allocation mutual fund	Michael H. Simon Beneficiary IRA at Ameriprise	Michael H. Simon	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
2013	Franklin Growth Alloc. CLA mutual fund	Suzanne Bonamici IRA at Ameriprise	Suzanne Bonamici	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
2014	Franklin Templeton Growth Allocation mutual fund	Michael H. Simon Beneficiary IRA at Ameriprise	Michael H. Simon	"None"	Capital Gains / Dividends	\$1,001 - \$2,500
2014	Franklin Growth Alloc. CLA mutual fund	Suzanne Bonamici IRA at Ameriprise	Suzanne Bonamici	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
2015	Franklin Growth Alloc. CLA mutual fund	Suzanne Bonamici IRA at Ameriprise	Suzanne Bonamici	\$15,001 - \$50,000	Dividends	\$201 - \$1,000

#### **MFS Intl Value CLA & MFS Value CLA**

The holdings listed in my Financial Disclosure Report for 2015 as “MFS Intl Value CLA” and “MFS Value CLA” were reported with incorrect values in 2015 because of a clerical error in transcribing financial documents.

These assets were filed in 2015 as:

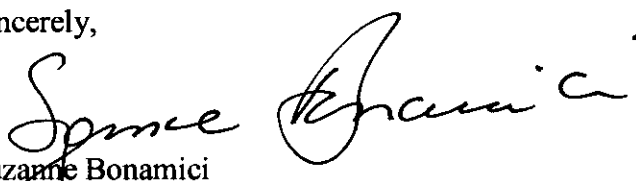
Year	Asset	Account	Owner	Value of Asset	Income Type	Income Amt.
2015	MFS Value CLA	Ameriprise Managed Asset Account	Jointly Owned	\$15,001 - \$50,000	Capital Gains / Dividends	\$5,000 - \$15,000
2015	MFS Intl Value CLA	Ameriprise Managed Asset Account	Jointly Owned	\$15,001 - \$50,000	Capital Gains/Dividends	\$2,501 - \$5,000

The filings should be amended for 2015 and reported as:

Year	Asset	Account	Owner	Value of Asset	Income Type	Income Amt.
2015	MFS Value CLA	Ameriprise Managed Asset Account	Jointly Owned	\$100,001 - \$250,000	Capital Gains/Dividends	\$5,000 - \$15,000
2015	MFS Intl Value CLA	Ameriprise Managed Asset Account	Jointly Owned	\$50,001 - \$100,000	Capital Gains/Dividends	\$2,501 - \$5,000

Thank you for your attention to this matter. I am grateful for the opportunity to correct the record so that my Financial Disclosure Reports are accurate. If you need any additional information or further clarifications please don't hesitate to contact to me.

Sincerely,

  
Suzanne Bonamici  
Member of Congress