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Amendment for

Senator Tom Udall

2008

Calendar Year

b13

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DESCRIPTION OF AMENDMENTS TO PERSONAL FINANCIAL DISCLOSURE COVERING 2008

In past years, Senator Udall has, at his own expense, paid the financial planning firm responsible for managing most of his investments to prepare a summary of investments and income that must be reported on financial disclosure statements. After passage of new disclosure requirements under the STOCK ACT, Senator Udall requested more detailed transaction records for 2012 from the financial planning firm.

After reviewing the more detailed records for 2012, discrepancies from previous years became apparent. This amendment includes updated information to correct the 2008 report. The decision to review and amend previous financial disclosure reports was made in the interest of improving the transparency and clarity of the reports and was not requested by the Senate Committee on Ethics or any outside group.

Grouping of Assets Held In Trust.

Many of the investments held by Senator Udall and his wife, Ms. Cooper, are jointly held in a trust. Because this trust is not a qualified blind trust, Senator Udall is required to disclose each underlying asset held by the trust, which he has done regularly. For this amendment, we are taking the extra step of grouping together and labeling which assets are held by the trust by indicating with a top line for the trust, followed by its underlying assets. This change does not reflect any change in the disclosure or value of assets held. It is simply intended to make the organization of investments easier to follow and clarify which assets are held by the trust.

Assets Renamed For Consistency Across All Years.

In order to provide more clarity regarding changes in assets from year to year, we are amending the names of several investments to clarify abbreviated financial jargon when possible and make the names of assets consistent across past reports.

Reporting Of Unearned Income From Mutual Funds Simplified.

When unearned income is derived from an investment asset, Senate ethics rules require members to show what types of income were accrued, whether it came from dividends, rent, interest, capital gains, or other sources. Mutual fund investments, which trade in a variety of investments, may yield different types of income from the funds' underlying assets, which must then be passed on to fund investors in a variety of ways.

While past reports have attempted to distinguish the different types of income derived from mutual funds, Senate ethics rules have actually provided a catch-all category to report income from these types of funds as an "excepted investment fund." This exception is also important to note because mutual funds that are not declared as excepted would require the Senator to disclose all of the investments and transactions made by the fund itself (resulting in possibly hundreds of pages added to the financial disclosure report) even though the Senator was not directly executing those transactions.

Although past reports attempted to be more transparent than necessary, we realized that it was more important to properly mark these funds as "excepted investment funds" in order to avoid confusion and show that these are not funds controlled by the Senator.

Previous Estimates For Income Related To Some Investments Revised.

After a more detailed review of specific financial transaction records, it was discovered that the actual income derived from some investments was slightly different from the estimates reported by the financial planning firm.

These changes are shown on Page 4, Lines 4, 5 & 10; Page 5, Lines 1, 5 & 6; and Page 6, Lines 6, 8 & 9.

Investment Income Reclassified.

After a more detailed review of specific financial transaction records, it was discovered that the type of income related to two assets was improperly classified. Dividend income from CBS Corp and distribution income from Wells Real Estate Funds VII-A was improperly marked as interest.

These changes are shown on Page 6, Line 2 and Page 8, Line 3.

Actual Value Of Cash Life Insurance Policy Revised.

The value of a cash-based Northwestern Mutual life insurance policy had previously been based on estimates. Additional documents were requested during this review process which showed the actual value of the policy was high enough to force it into the next bracket.

This change is shown on Page 7, Line 6.

Additional Disclosure Of Investments Supporting Retirement Accounts.

Financial disclosure reports for past years disclosed three variable annuity plans jointly held by Senator and Ms. Cooper, however these annuity plans were incorrectly listed with the total value of each plan on a single line. After requesting and reviewing further documentation from the plan providers, we have determined that these plans do not meet the criteria necessary to be treated as excepted investment funds. As a result, we have amended the financial disclosure statement to provide additional transparency by showing the underlying mutual fund investments supporting these plans.

Additionally, financial disclosure reports for past years disclosed Senator Udall's New Mexico Public Employees Retirement account as a single excepted investment fund. After further review of additional documentation, we questioned our previous determination that the fund meets all criteria of an excepted investment fund. In the interest of erring on the side of transparency, we chose to separate out and list the two underlying funds of the NM Public Employees Retirement Association, which can each be treated separately as excepted investment funds.

These changes are shown on Page 3, Line 2 through Page 4, Line 2 and Page 7, Lines 3-5.

Additional Disclosure Of Disposed Assets.

The original financial disclosure statement disclosed the sales of several assets. The sale amounts for these transactions were reported in Part IV of the disclosure statement. Since these assets were no longer held at the close of the reporting period, they were not included in the list of assets held by the Senator. However, further review of records has shown that even though some of these assets sold at a loss, they did yield some unearned income in the form of interest or dividends, which would trigger a requirement for the assets to be listed in Parts IIIA and IIIB of the disclosure statement in order to show the unearned income even though the Senator no longer owned them.

These changes are shown on Page 4, Lines 6-8; Page 5, Lines 7-9; and Page 6, Line 4.

Removal Of Confusing Automatic Reinvestments.

Past financial disclosure statements have over-reported several small, automatic dividend reinvestment and related money market account transactions to the point of creating the impression of transactions that were larger than what actually occurred. There were several transactions occurring on an automatic basis to reinvest dividends from mutual funds. Under Senate reporting rules, these transactions do not need to be reported. Additionally, rules only require reporting of individual transactions that exceed \$1,000. Past financial disclosure statements have taken the extra step of reporting reinvestment transactions that in aggregate totaled more than \$1,000 over the course of the entire year.

However in many cases, the individual transactions fell below the \$1,000. The decision to over-report, along with the layout of the form led to the inaccurate impression that more than \$1,000 was being transacted every quarter (or month in some cases). In order to conform to the intended use of the disclosure form and clear up the false impression of a much higher trading volume created by the form's design, we have removed references to reinvestment transactions that were unnecessary to report. These transactions are still visible in the original report, which will remain a public record.

This change affects Page 7, Line 12 through Page 9, Line 3 of the original disclosure.

Clarification Of Stock Sale Executed As Two Transactions.

The original disclosure showed the sale of Merck (MRK) stock on October 8, 2008 as a single transaction. However, recently-retrieved financial records show that the sale was actually executed in two transactions on the same day. This amendment shows the October 8 sale of Merck stock as two separate transactions.

Page 9, Lines 9 & 10.

UNITED STATES SENATE FINANCIAL DISCLOSURE REPORT FOR ANNUAL AND TERMINATION FILERS

<input checked="" type="checkbox"/> Amendment			
Last Name	First Name and Middle Initial	Annual Report	
Udall	Thomas S. (Tom)	Calendar Year Covered by Report	Senate Office / Agency in Which Employed
Senate Office Address (Number, Street, City, State, and ZIP Code)	Senate Office Telephone Number (Include Area Code)	Termination Report	Prior Office / Agency in Which Employed
110 Hart Senate Office Building Washington, D.C. 20510	202-224-6621	Termination Date (mm/dd/yy)	U.S. House of Representatives

AFTER READING THE INSTRUCTIONS – ANSWER EACH OF THESE QUESTIONS AND ATTACH THE RELEVANT PART

	YES	NO		YES	NO
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 PART I.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Did you, your spouse, or dependent child receive any reportable travel or reimbursements for travel in the reporting period (i.e., worth more than \$350 from one source)? If Yes, complete and attach PART VI.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you or your spouse have earned income (e.g., salaries or fees) or non-investment income of more than \$200 from any reportable source in the reporting period? If Yes, complete and attach PART II.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Did you, your spouse, or dependent child have any reportable liability (more than \$10,000) during the reporting period? If Yes, complete and attach PART VII.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you, your spouse, or dependent child hold any reportable asset worth more than \$1,000 at the end of the period, or receive unearned or investment income of more than \$200 in the reporting period? If Yes, complete & attach PART IIIA and/or IIIB.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Did you hold any reportable positions on or before the date of filing in the current calendar year? If Yes, complete and attach PART VIII.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset worth more than \$1,000 in the reporting period? If Yes, complete and attach PART IV.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Do you have any reportable agreement or arrangement with an outside entity? If Yes, complete and attach PART IX.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you, your spouse, or dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$350 and not otherwise exempt)? If Yes, complete and attach PART V.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	If this is your FIRST Report: Did you receive compensation of more than \$5,000 from a single source in the two prior years? If Yes, complete and attach PART X.	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Each question must be answered and the appropriate PART attached for each “YES” response.

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Thomas S. (Tom) Udall

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PART II. EARNED AND NON-INVESTMENT INCOME

Report the source (name and address), type, and amount of earned income to you from any source aggregating \$200 or more during the reporting period. For your spouse, report the source (name and address) and type of earned income which aggregate \$1,000 or more during the reporting period. No amount needs to be specified for your spouse. (See p.3, CONTENTS OF REPORTS Part B of Instructions.) Do not report income from employment by the U.S. Government for you or your spouse.

Individuals not covered by the Honoraria Ban:

For you and /or your spouse, report honoraria income received which aggregates \$200 or more by exact amount, give the date of, and describe the activity (speech, appearance or article) generating such honoraria payment. Do not include payments in lieu of honoraria reported on Part I.

	Name of Income Source	Address (City, State)	Type of Income	Amount
Example:	JP Computers	Wash., DC	EXAMPLE	Salary \$15,000
	MCI (Spouse)	Arlington, VA	EXAMPLE	Salary Over \$1,000
1	Smithsonian Institution (spouse)	Washington, D.C.	salary	n/a
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Thomas S. (Tom) Udall

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PART IIIA. PUBLICLY TRADED ASSETS AND UNEARNED INCOME SOURCES

BLOCK A

Identity of Publicly Traded Assets
And Unearned Income Sources

Report the complete name of each publicly traded asset held by you, your spouse, or your dependent child, (See p.3, *CONTENTS OF REPORTS Part B of Instructions*) for production of income or investment which:

- (1) had a value exceeding \$1,000 at the close of the reporting period; and/or
- (2) generated over \$200 in "unearned" income during the reporting period.

Include on this PART IIIA a complete identification of each public bond, mutual fund, publicly traded partnership interest, excepted investment funds, bank accounts, excepted and qualified blind trusts, and publicly traded assets of a retirement plan.

BLOCK B
Valuation of Assets

At the close of reporting period.
If None, or less than \$1,001,
Check the first column.

None (or less than \$1,001)																				
\$1,001 - \$15,000	X																			
\$15,001 - \$50,000		X																		
\$50,001 - \$100,000			X																	
\$100,001 - \$250,000				X																
\$250,001 - \$500,000					X															
\$500,001 - \$1,000,000						X														
Over \$1,000,000***							X													
\$1,000,001 - \$5,000,000								X												
\$5,000,001 - \$25,000,000									X											
\$25,000,001 - \$50,000,000										X										
Over \$50,000,000											X									

BLOCK C
Type and Amount of Income

Type of Income

Amount of Income

Actual
Amount
Required
if
"Other"
Specified

S, Example: DC, or J	IBM Corp. (stock)																					Example
	(S) Keystone Fund				X																Example	
1 J	Thomas S. & Jill Cooper Udall Revocable Trust (page 3, line 2 - page 5, line 10)																					
2 J	PacificLife Select Variable Annuity (450)																					
3 J	BlackRock Equity Index	X																				
4 J	ClearBridge Large-Cap Value		X																			
5 J	Oppenheimer Main Street Core	X																				
6 J	MFS International Large-Cap		X																			
7 J	PacificLife Value Variable Annuity (414)																					
8 J	Portfolio Optimization Model C14					X																
9 J	TransAmerica Variable Annuity																					
10 J	TransAmerica Capital Guardian Value VP	X																				

EXEMPTION TEST (see instructions before marking box): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right.

*** This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.

Reporting Individual's Name

 Amendment

Thomas S. (Tom) Udall

Page Number

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PART IIIA. PUBLICLY TRADED ASSETS AND UNEARNED INCOME SOURCES

BLOCK A

Identity of Publicly Traded Assets
And Unearned Income Sources

Report the complete name of each publicly traded asset held by you, your spouse, or your dependent child, (See p.3, *CONTENTS OF REPORTS Part B of Instructions*) for production of income or investment which:

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BLOCK B
Valuation of Assets

At the close of reporting period.
If None, or less than \$1,001,
Check the first column.

None (or less than \$1,001)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000**	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000
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BLOCK C
Type and Amount of Income

Type of Income							Amount of Income														
None	Dividends	Rent	Interest	Capital Gains	Excepted Investment Fund	Excepted Trust	Qualified Blind Trust	Other (Specify Type)	None (or less than \$201)	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000**	\$1,000,001 - \$5,000,000	Over \$5,000,000	Actual Amount Required if "Other" Specified	

S, Example: DC, or J	IBM Corp. (stock)		X								
	(S) Keystone Fund			X							
1 J	TransAmerica T. Rowe Price Growth Stock VP			X							
2 J	TransAmerica BlackRock Large Cap Value VP			X							
3 J	ING Classic (Money Market Account) (S90)				X						
4 J	Albuquerque NM Gross Receipts Tax Refunding Series C Bond			X							
5 J	NM Finance Authority Revenue Court Facilities Fee Series A Bond			X							
6 J	NM Finance Authority St. Transportation Revenue Refunding Subordinate Lien Series B Bond		X								
7 J	Puerto Rico Commonwealth Pub Impt - Series A Bond		X								
8 J	California State Var. Purp. Bond		X								
9 J	CAIBX: Capital Income Builder Fund Class A			X							
10 J	ESIYX: Evergreen International Bond Fund Class A		X								

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Thomas S. (Tom) Udall

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PART IIIA. PUBLICLY TRADED ASSETS AND UNEARNED INCOME SOURCES

BLOCK A

Identity of Publicly Traded Assets
And Unearned Income Sources

Report the complete name of each publicly traded asset held by you, your spouse, or your dependent child, (See p.3, *CONTENTS OF REPORTS Part B of Instructions*) for production of income or investment which:

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BLOCK B
Valuation of Assets

At the close of reporting period.
If None, or less than \$1,001,
Check the first column.

None (or less than \$1,001)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000
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BLOCK C
Type and Amount of Income

	Type of Income						Amount of Income														
	None	Dividends	Rent	Interest	Capital Gains	Excepted Investment Fund	Excepted Trust	Qualified Blind Trust	Other (Specify Type)	None (or less than \$201)	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	Over \$5,000,000	Actual Amount Required if "Other" Specified
S, Example: DC, or J	IBM Corp. (stock)	X																			Example
	(S) Keystone Fund		X																		Example
1 J	EKWAX: Evergreen Precious Metals Holding Class A	X																			
2 J	EWEAX: Evergreen Intrinsic World Equity Fund		X																		
3 J	AGTHX: American Funds Growth Fund of America Class A		X																		
4 J	AIVSX: American Funds Investment Company of America Class A (590)		X																		
5 J	ANWPX: American Funds New Perspective Fund Class A (590)		X																		
6 J	AWSHX: American Funds Washington Mutual Investors Fund Class A (590)		X																		
7 J	PLD: Prologis	X																			
8 J	VMPAX: Evergreen Strategic Municipal Bond Fund	X																			
9 J	NYVTX: Davis NY Venture Fund (590)	X																			
10 J	Liberty Composite Fund, L.P.			X																	

EXEMPTION TEST (see instructions before marking box): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right.

*** This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.



PART IIIA. PUBLICLY TRADED ASSETS AND UNEARNED INCOME SOURCES

BLOCK A

Identity of Publicly Traded Assets
And Unearned Income Sources

Report the complete name of each publicly traded asset held by you, your spouse, or your dependent child, (See p.3, *CONTENTS OF REPORTS Part B of Instructions*) for production of income or investment which:

- (1) had a value exceeding \$1,000 at the close of the reporting period; and/or
- (2) generated over \$200 in "unearned" income during the reporting period.

Include on this PART IIIA a complete identification of each public bond, mutual fund, publicly traded partnership interest, excepted investment funds, bank accounts, excepted and qualified blind trusts, and publicly traded assets of a retirement plan.

S, Example: DC, or J	IBM Corp. (stock)		X																	
	(S) Keystone Fund			X																
1	Pershing Government Account (Money Market Account) (998)		X																	
2	CBS: CBS Corp Cl B com	X																		
3	KSRAX: Kensington Strategic Realty Fund Class A		X																	
4	MRK: Merk	X																		
5	S Pershing Government Account (Money Market Account) (004)		X																	
6	S AWPAX: Alliance Bernstein International Growth Fund Class A		X																	
7	S NYVTX: Davis NY Venture Class A (004)			X																
8	S AEPGX: Europacific Growth Fund Class A			X																
9	S SMCWX: Smallcap World Fund Class A		X																	
10	S AWSHX: Washington Mutual Investors Fund Class A (467)			X																

BLOCK B

Valuation of Assets

At the close of reporting period.
If None, or less than \$1,001,
Check the first column.

None (or less than \$1,001)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000***												

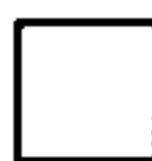
BLOCK C

Type and Amount of Income

Type of Income							Amount of Income											
None (or less than \$201)	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$100,000	Over \$100,000***	Over \$5,000,000	Actual Amount Required if "Other" Specified	Example									
None	X								X									
Dividends										X								
Rent											X							
Interest												X						
Capital Gains													X					
Excepted Investment Fund														X				
Excepted Trust															X			
Qualified Blind Trust																X		
Other (Specify Type)																		X

EXEMPTION TEST (see instructions before marking box): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right.

*** This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.



Thomas S. (Tom) Udall

PART IIIA. PUBLICLY TRADED ASSETS AND UNEARNED INCOME SOURCES

BLOCK A
**Identity of Publicly Traded Assets
And Unearned Income Sources**

Report the complete name of each publicly traded asset held by you, your spouse, or your dependent child, (See p.3, *CONTENTS OF REPORTS Part B of Instructions*) for production of income or investment which:

- (1) had a value exceeding \$1,000 at the close of the reporting period; and/or
- (2) generated over \$200 in "unearned" income during the reporting period.

Include on this PART IIIA a complete identification of each public bond, mutual fund, publicly traded partnership interest, excepted investment funds, bank accounts, excepted and qualified blind trusts, and publicly traded assets of a retirement plan.

BLOCK B
Valuation of Assets

At the close of reporting period.
If None, or less than \$1,001,
Check the first column.

None (or less than \$1,001)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000**	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000
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BLOCK C
Type and Amount of Income

Type of Income							Amount of Income														
None	Dividends	Rent	Interest	Capital Gains	Excepted Investment Fund	Excepted Trust	Qualified Blind Trust	Other (Specify Type)	None (or less than \$201)	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000**	\$1,000,001 - \$5,000,000	Over \$5,000,000	Actual Amount Required if "Other" Specified	

S, Example: DC, or J	IBM Corp. (stock)	X																			
	(S) Keystone Fund		X																		
1 S	AIVSX: American Funds Investment Company of America Class A (467)		X																		
2 S	ANWPX: American Funds New Perspective Fund Class A (467)		X																		
3	NM Public Employees Retirement Association																				
4	RGAFX: American Funds Growth Fund of America R5			X																	
5	State of New Mexico Stable Value Fund		X																		
6 J	Northwestern Mutual Paid Up life Insurance (cash)			X																	
7																					
8																					
9																					
10																					

EXEMPTION TEST (see instructions before marking box): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right.

*** This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.

Thomas S. (Tom) Udall

PART IIIB. NON-PUBLICLY TRADED ASSETS AND UNEARNED INCOME SOURCES

8

BLOCK A

Identity of Non-Publicly Traded Assets and Unearned Income Sources

Report the name, address (city, state and description) of each interest held by you, your spouse, or your dependent child (See p.3, CONTENTS OF REPORTS Part B of Instructions) for the production of income or investment in a non-public trade or business which:

- (1) had a value exceeding \$1,000 at the close of the reporting period; and/or
- (2) generated over \$200 in "unearned" income during the reporting period.

Include the above report for each underlying asset, which is not incidental to the trade or business. Publicly traded assets held by non-public entity may be listed on Part IIIA.

BLOCK B

Valuation of Assets

At the close of reporting period.
If None, or less than \$1,001,
Check the first column.

None (or less than \$1,001)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000
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BLOCK C

Type and Amount of Income

Type of Income										Amount of Income									
None	Dividends	Rent	Interest	Capital Gains	Excepted Investment Fund	Excepted Trust	Qualified Blind Trust	Other (Specify Type)	None (or less than \$201)	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000***	Over \$5,000,000	Actual Amount Required if "Other" Specified
X									X	X				X					Example
	X								X		X				X				Example

S, Example: DC, or J	JP Computer, Software Design, Wash DC
	Undeveloped land, Dubuque, Iowa

1 J	Thomas S. & Jill Cooper Udall Revocable Trust (lines 2-3)
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2 J	Inland Western REIT, Inc., Oak Brook, IL
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3 J	Wells Real Estate Funds VIII-A, Norcross, GA
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EXEMPTION TEST (see instructions before marking box): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right.

** This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.

PART IV. TRANSACTIONS

Report any purchase, sale, or exchange by you, your spouse, or dependent child (See p.3 CONTENTS OF REPORTS Part B of Instructions) during the reporting period of any real property, stocks, bonds, commodity futures, and other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Do not report a transaction involving property used solely as your personal residence, or a transaction between you, your spouse, or dependent child. Please clarify which two properties are involved in any reportable exchange.

Identification of Assets

		Transaction Type (x)			Amount of Transaction (x)										
		Purchase	Sale	Exchange	Transaction Date (Mo., Day, Yr.)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000**	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000
Example: DC, or J															
S,															
IBM Corp. (stock) NYSE		X			2/1/1X	X				E	X	A	M	P	
(DC) Microsoft (stock) NASDAQ/OTC			X		1/27/1X				X	E	X	A	M	P	
1	J	PLD: Prologis		X	1/9/08	X									
2	J	VMPAX: Evergreen Strategic Municipal Bond Fund		X	4/14/08		X								
3	J	NM Finance Authority St. Transportation Revenue Refunding Subordinate Lien Series B Bond		X	6/16/08	X									
4	J	Puerto Rico Commonwealth Pub Impt - Series A Bond		X	7/1/08	X									
5	J	California State Var. Purp. Bond		X	9/2/08	X									
6	J	NYVTX: Davis NY Venture Fund (590)		X	12/3/08		X								
7	J	EKZAX: Evergreen International Equity Fund Class A		X	12/3/08		X								
8	J	EWEAX: Evergreen Intrinsic World Equity Fund		X	12/3/08		X								
9		MRK: Merk		X	10/8/08	X									
10		MRK: Merk		X	10/8/08	X									
11		MHS: Medco Health Solutions, Inc.		X	10/9/08	X									
12	S	PLD: Prologis		X	1/9/08	X									

EXEMPTION TEST (see instructions before marking box): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right.

*** This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.