



Filing ID #10015706

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Bill Shuster  
**Status:** Member  
**State/District:** PA09

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2016  
**Filing Date:** 08/7/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Blairmont Club, LLC		\$1,001 - \$15,000	None		<input type="checkbox"/>
LOCATION: Hollidaysburg, PA, US DESCRIPTION: Membership interest in Blairmont Club, LLC. Hollidaysburg, PA					
Cion INVT Corp Com		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: A non-traded business development company, or BDC, that primarily invests in the senior secured debt of U.S. middle market companies, which we define as companies with annual EBITDA of \$50 million or less. CION's investment objective is to generate current income and, to a lesser extent, capital appreciation for its investors.					
Congressional FCU #0550		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Congressional Federal Credit Union ⇒ Congressional FCU 180		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Congressional Federal Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Genesis Drilling Program IV MLP		\$50,001 - \$100,000	Distribution	None	<input type="checkbox"/>
DESCRIPTION: General Partnership Interest in Genesis Drilling Program IV, LP					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
M&T Bank #1037	DC	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
M&T Bank #2383	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
M&T Bank #8361	JT	None	Interest	None	<input type="checkbox"/>
COMMENTS: This account was closed out in April 2016					
M&T Bank #9749	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ Blackrock Global		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ Brokerage Money Market		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ Capital Income		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ First Eagle Global		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ Income Fund of America		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ Ivy Fund Asset Strategy		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ Lord Abbett Floating Rate		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ Lord Abbett Short Duration		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ Phillips Edison		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt ⇒ PIMCO		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt 2 ⇒ Powershares		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SFS LLC Private Wealth Mgmt 2 ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Prudential Global					
SFS LLC Private Wealth Mgmt 2 ⇒ Sharespost		\$1,001 - \$15,000	None		<input type="checkbox"/>
SFS LLC Private Wealth Mgmt 2 ⇒ Total Income + Real Estate		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Shuster Family Partnerships ⇒ 5 S LLC		\$1,001 - \$15,000	Distribution	None	<input type="checkbox"/>
LOCATION: Everett, Bedford, PA, US DESCRIPTION: General Partner of Shuster Family Limited Partnership Bedford Pennsylvania COMMENTS: The sole assets contained in this asset are comprised of a 1% ownership interest in Shuster Family Limited Partnership I, II, III. The 1% ownership interest falls below the reporting threshold for Shuster Family Limited Partnerships I, II, III.					
Shuster Family Partnerships ⇒ Shuster Family Limited Partnership I		\$50,001 - \$100,000	Partnership	None	<input type="checkbox"/>
LOCATION: Everett, Bedford, PA, US DESCRIPTION: Limited Partnership Interest in Real Property in Bedford, Pennsylvania					
Shuster Family Partnerships ⇒ Shuster Family Limited Partnership II		\$15,001 - \$50,000	Partnership	None	<input type="checkbox"/>
LOCATION: Everett, Bedford, PA, US DESCRIPTION: Limited Partnership Interest in Real Property in Bedford Pennsylvania					
Shuster Family Partnerships ⇒ Shuster Family Limited Partnership III		\$1,001 - \$15,000	Partnership	None	<input type="checkbox"/>
LOCATION: Everett, Bedford, PA, US DESCRIPTION: Limited partnership interest in real property in Bedford Pennsylvania					
WS IRA Stonebridge Capital Management ⇒ SEI Core Fixed Income Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
WS IRA Stonebridge Capital Management ⇒ SEI Emerging Mkts Equity Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
WS IRA Stonebridge Capital Management ⇒ SEI International Equity Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
WS IRA Stonebridge Capital Management ⇒ SEI International Fixed Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
WS IRA Stonebridge Capital Management ⇒ SEI Large Cap Growth Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
WS IRA Stonebridge Capital Management ⇒ SEI Large Cap Value Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
WS IRA Stonebridge Capital Management ⇒ SEI Small Cap Growth Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
WS IRA Stonebridge Capital Management ⇒ SEI Small Cap Value Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

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

**SCHEDULE B: TRANSACTIONS**

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Cion INVT Corp Com		Monthly	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: A non-traded business development company, or BDC, that primarily invests in the senior secured debt of U.S. middle market companies, which we define as companies with annual EBITDA of \$50 million or less. CION's investment objective is to generate current income and, to a lesser extent, capital appreciation for its investors.					

**SCHEDULE C: EARNED INCOME**

None disclosed.

**SCHEDULE D: LIABILITIES**

None disclosed.

**SCHEDULE E: POSITIONS**

Position	Name of Organization
Partner	5S LLC
COMMENTS: 1 of 5 uncompensated partners	
Partner	Shuster Family Limited Partnership I
COMMENTS: 1 of 5 uncompensated partners	
Partner	Shuster Family Limited Partnership II
COMMENTS: 1 of 5 uncompensated partners	
Partner	Shuster Family Limited Partnership III

Position	Name of Organization
COMMENTS: 1 of 5 uncompensated partners	

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Congressional Federal Credit Union  
LOCATION: US
- SFS LLC Private Wealth Mgmt  
LOCATION: Altoona/Blair, PA, US
- SFS LLC Private Wealth Mgmt 2  
LOCATION: Altoona/Blair, PA, US
- Shuster Family Partnerships  
LOCATION: US
- WS IRA Stonebridge Capital Management

## 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

## 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:** Hon. Bill Shuster , 08/7/2017