INSIDE MAIL

UNITED STATES HOUSE OF REPRESENTATIVES
CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

Form A
For use by Members, officers, and employees

LEGISLATIVE RESOURCE CENTER
2009 MAY -6 AM 11:39
OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES
(Office Use Only)

MC

Name: Thomas E. Petri

Daytime Telephone: 920-922-1180

Filer Status ☐ Member of the U.S. House of Representatives State: ______ District: ______ ☐ Officer or Employee Employing Office: ______

Report Type ☑ Annual (May 15) ☐ Amendment ☐ Termination Termination Date: ______

A $200 penalty shall be assessed against anyone who files more than 30 days late.

PRELIMINARY INFORMATION — ANSWER EACH OF THESE QUESTIONS

I. Did you or your spouse have "earned" income (e.g., salaries or fees) of $200 or more from any source in the reporting period? **If yes, complete and attach Schedule I.**	Yes ☑	No ☐
II. 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 Schedule II.**	Yes ☑	No ☐
III. Did you, your spouse, or a dependent child receive "unearned" income of more than $200 in the reporting period or hold any reportable asset worth more than $1,000 at the end of the period? **If yes, complete and attach Schedule III.**	Yes ☑	No ☐
IV. Did you, your spouse, or a dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding $1,000 during the reporting period? **If yes, complete and attach Schedule IV.**	Yes ☑	No ☐
V. Did you, your spouse, or a dependent child have any reportable liability (more than $10,000) during the reporting period? **If yes, complete and attach Schedule V.**	Yes ☑	No ☐
VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than $335 and not otherwise exempt)? **If yes, complete and attach Schedule VI.**	Yes ☐	No ☑
VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than $335 from one source)? **If yes, complete and attach Schedule VII.**	Yes ☑	No ☐
VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year? **If yes, complete and attach Schedule VIII.**	Yes ☑	No ☐
IX. Did you have any reportable agreement or arrangement with an outside entity? **If yes, complete and attach Schedule IX.**	Yes ☐	No ☑

Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION — ANSWER EACH OF THESE QUESTIONS

TRUSTS—Details regarding "Qualified Blind Trusts" approved by the Committee on standards of Official Conduct 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? Do not answer "yes" unless you have first consulted with the Committee on Standards of Official Conduct.	Yes ☐	No ☑

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SCHEDULE I—EARNED INCOME

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totalling $200 or more during the preceding calendar year. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding $1,000. See examples below.
Exclude: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

	Source	Type	Amount
Examples:	Keene State	*Approved Teaching Fee*	$6,000
	State of Maryland	Legislative Pension	$9,000
	Civil War Roundtable (Oct. 2nd)	Spouse Speech	$1,000
	Ontario County Board of Education	Spouse Salary	NA
	AMERICAN COUNCIL OF TRUSTEES AND ALUMNI	SPOUSE SALARY	NA
	WISCONSIN RETIREMENT FUND	LEGISLATIVE PENSION	$5,872.96

For payments to charity in lieu of honoraria, use Schedule II.

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SCHEDULE II — PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of an honorarium. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Standards of Official Conduct. A green envelope for transmitting the list is included in each Member's filing package.

	Source	Activity	Date	Amount
Examples:	Association of American Associations, Washington DC	Speech	Feb. 2, 2008	$2,000
	XYZ Magazine	Article	Aug. 13, 2008	$500
	SOCIETY INSURANCE, FOND DU LAC, WISC.	MEETING OF INVESTMENT COMMITTEE OF BOARD AS MEMBER	AUG. 19	$500
	SOCIETY INSURANCE, FOND DU LAC, WIS.	BOARD MEMBERSHIP	$300 PER MONTH	$3,600
	SOCIETY INSURANCE, FOND DU LAC, WIS.	BOARD MEETING	JULY 21	$500
	SOCIETY INSURANCE, FOND DU LAC, WIS.	BOARD MEETING	OCT. 20	$500
	SOCIETY INSURANCE, FOND DU LAC, WISC.	BOARD MEETING.	DEC. 15	$500
	LIBERTY FUND	PRESENTATION	MARCH 12	$900
	AMERICAN ENTERPRISE INSTITUTE	PRESENTATION	APRIL 4	$750
	MINNESOTA ASSOCIATION OF SCHOLARS	PRESENTATION	APRIL 4	$1,000

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SCHEDULE III—ASSETS AND "UNEARNED" INCOME

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BLOCK A

Asset and/or Income Source

Identify (a) each asset held for investment or production of income with a fair market value exceeding $1,000 at the end of the reporting period, and (b) any other asset or sources of income which generated more than $200 in "unearned" income during the year. For rental property or land, provide a complete address. Provide full names of stocks and mutual funds (do not use ticker symbols). For ***all IRAs*** and other retirement plans (such as 401(k) plans) that are self directed (*i.e.,* plans in which you have the power, *even if not exercised,* to select the specific investments), provide the value and income information on ***each asset*** in the account that exceeds the reporting threshold. For retirement plans that are not self-directed, name the institution holding the account and its value at the end of the reporting period. For an active business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. For additional information, see the instruction booklet.

Exclude: Your personal residence(s) (unless there is rental income); any debt owed to you by your spouse, or by you or your spouse's child, parent, or sibling; any deposits totalling $5,000 or less in personal savings accounts; any financial interest in or income derived from U.S. Government retirement programs.

If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC) or is jointly held (JT), in the optional column on the far left.

BLOCK B

Value of Asset

Indicate value of asset at close of reporting year. If you use a valuation method other than fair market value, please specify the method used.

If an asset was sold during the reporting year and is included only because it generated income, the value should be "None."

BLOCK C

Type of Income

Check all columns that apply. For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA." For all other assets ***including all IRAs,*** indicate the type of income by checking the appropriate box below. **Dividends and interest, even if reinvested, should be listed as income.** Check "None" if asset did not generate any income during calendar year.

BLOCK D

Amount of Income

For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, ***including all IRAs,*** indicate the category of income by checking the appropriate box below. **Dividends and interest, even if reinvested, should be listed as income.** Check "None" if no income was earned or generated.

BLOCK E

Transaction

Indicate if the asset had purchases (P), sales (S), or exchanges (E) exceeding $1000 in reporting year.

		A	B	C	D	E	F	G	H	I	J	K	L								I	II	III	IV	V	VI	VII	VIII	IX	X	XI	If only a portion of an asset is sold, please indicate as follows: (S) (partial) See below for example.
		None	$1 – $1,000	$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	$1,000,001 – $5,000,000	$5,000,001 – $25,000,000	*$25,000,001 – $50,000,000*	Over $50,000,000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	Other Type of Income (Specify: For Example, Partnership Income or Farm Income)	None	$1 – $200	$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	$1,000,001 – $5,000,000	Over $5,000,000	P, S, E
SP, DC, JT *Examples:* SP	Mega Corp. Stock					X									X			X						X								S (partial)
	Simon & Schuster		Indefinite																	Royalties									X			
	1st Bank of Paducah, KY Accounts						X									X										X						
	Wisconsin Retirement Fund							X							X		X	X								X						
	Wells Fargo Advantage Funds				X										X		X	X							X							P
	Jain Fund						X								X		X	X							X							P
	U.S. Bank Stock									X					X														X			
	Wyeth Corp. Stock				X										X								X									P
	American Express Stock				X										X									X								P

For additional assets and unearned income, use next page.

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

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	BLOCK A Asset and/or Income Source	BLOCK B Year-End Value of Asset												BLOCK C Type of Income							BLOCK D Amount of Income											BLOCK E Transaction
SP, DC, JT		A None	B $1 – $1,000	C $1,001 – $15,000	D $15,001 – $50,000	E $50,001 – $100,000	F $100,001 – $250,000	G $250,001 – $500,000	H $500,001 – $1,000,000	I $1,000,001 – $5,000,000	J $5,000,001 – $25,000,000	K $25,000,001 – $50,000,000	L Over $50,000,000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	Other Type of Income (Specify)	I None	II $1 – $200	III $201 – $1,000	IV $1,001 – $2,500	V $2,501 – $5,000	VI $5,001 – $15,000	VII $15,001 – $50,000	VIII $50,001 – $100,000	IX $100,001 – $1,000,000	X $1,000,001 – $5,000,000	XI Over $5,000,000	P, S, E
	WALGREEN CORP, STOCK									X					X													X				P
	ASSOCIATED BANK, STOCK			X											X								X									P
	MARSHALL & ILSLEY, STOCK							X							X												X					P
	BERKSHIRE HATHAWAY, STOCK									X				X							X											
	LLOYD'S OF LONDON									X					X		X	X												X		
	U.S. BANK TRUST, CASH	X																			✓											
	U.S. BANK TRUST, TREASURY FD.				X												X						X									
	BAIRD CASH EQUIVALENT					X											X						X									
	MERRILL LYNCH CASH EQUIV.			X													X					X										
	U.S. TREASURY BONDS							X									X										X					P
	HERITAGE UNDERWRITING, STOCK						X								X									X								S
	EQUITAS TRUST				X									X							X											
	RENTAL PROP, N5327 [illegible] DR, F.D.L.				X									X							X											
	PERKINS ELMER CO, STOCK			X											X							X										
	CORNING CORP, STOCK							X							X									X								P
	EBAY CORP, STOCK						X							X																		
	WASHINGTON POST CO, STOCK					X									X										X							
	SALOMON SMITH BARNEY BD		X														X					X										
	PILOT JEFFREY CORP, STOCK					X								X																		
	EVERGREEN INT'L FUND																															
	~~[illegible]~~ EATON VANCE B.T.H. INCOME				X										X									X								S

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SCHEDULE III ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

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SP, DC, JT	BLOCK A Asset and/or Income Source	BLOCK B Year-End Value of Asset												BLOCK C Type of Income							BLOCK D Amount of Income											BLOCK E Transaction P, S, E
		A None	B $1 – $1,000	C $1,001 – $15,000	D $15,001 – $50,000	E $50,001 – $100,000	F $100,001 – $250,000	G $250,001 – $500,000	H $500,001 – $1,000,000	I $1,000,001 – $5,000,000	J $5,000,001 – $25,000,000	K $25,000,001 – $50,000,000	L Over $50,000,000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	Other Type of Income (Specify)	I None	II $1 – $200	III $201 – $1,000	IV $1,001 – $2,500	V $2,501 – $5,000	VI $5,001 – $15,000	VII $15,001 – $50,000	VIII $50,001 – $100,000	IX $100,001 – $1,000,000	X $1,000,001 – $5,000,000	XI Over $5,000,000	
	McGraw Hill Co, Stock							X							✓											X						P
	Wm Wrigley Co., Stock	X													X											X						S
	Northwest Mutual Life Annuity			X													X						X									
	Manitowoc Co, Stock					X									X								X									P
	Oshkosh Co., Stock				X										X									X								P
	Integrys E., Co					X									X											X						P
	Metavante Corp. Stock						X							X							X											
	Danaher Corp, Stock					X									X								X									P
	Emerson Electric Co, Stock				X										X							X										P

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SCHEDULE IV— TRANSACTIONS

Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded $1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. **If only a portion of an asset is sold, please so indicate (i.e., "partial sale").** See example below.

SP, DC, JT	Asset	Type of Transaction: PURCHASE	SALE	EXCHANGE	Date (MO/DAY/YR) or Quarterly, Monthly, or Bi-weekly, if applicable	Amount of Transaction: B $1,001-$15,000	C $15,001-$50,000	D $50,001-$100,000	E $100,001-$250,000	F $250,001-$500,000	G $500,001-$1,000,000	H $1,000,001-$5,000,000	I $5,000,001-$25,000,000	J $25,000,001-$50,000,000	K Over $50,000,000
SP	*Example:* Mega Coporation Common Stock (partial sale)		X		10–12–08		X								
	Wells Fargo Advantage Funds	X			IRA Dividend Reinvestment	X									
	Aim Fund	X			"	X									
	Wyeth Corp, Stock.	X			Dividend Reinvestment	X									
	American Express, Stock	X			"	X									
	Walgreen Corp, Stock	X			"	X									
	Associated Bank, Stock	X			"	X									
	Marshall & Ilsley Bank, Stock	X			"	X									
	U.S. Treasury Bonds	X			Jan. 2, 09	X									
	Heritage Underwriting, Stock		X		28-5-08			X							
	Corning Corp, Stock	X			Dividend Reinvestment	X									
	Eaton Vance Enhanced/Income II Fund.		S		12-17-08			X							
	McGraw Hill Co., Stock	X			7-10-08		X								
	Wm. Wrigley Co., Stock		S		2-1-08	X									
	Manitowoc Co., Stock	X			7-10-08		X								
	Integrys Energy, Co., Stock	X			6-6-08	X									
	Marshall & Ilsley Stock	X			7/10/08	X									

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SCHEDULE IV— TRANSACTIONS

Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded $1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. **If only a portion of an asset is sold, please so indicate (i.e., "partial sale").** See example below.		Type of Transaction			Date	Amount of Transaction									
		PURCHASE	SALE	EXCHANGE	(MO/DAY/YR) or Quarterly, Monthly, or Bi-weekly, if applicable	B $1,001-$15,000	C $15,001-$50,000	D $50,001-$100,000	E $100,001-$250,000	F $250,001-$500,000	G $500,001-$1,000,000	H $1,000,001-$5,000,000	I $5,000,001-$25,000,000	J $25,000,001-$50,000,000	K Over $50,000,000
SP, DC, JT	Asset														
SP	*Example:* Mega Coporation Common Stock (partial sale)		X		10-12-08		X								
	MARSHALL & ILSLEY STOCK	X			11/10/08	X									
	OSHKOSH Co., STOCK	X			7-10-08		X								
	DANAHER CORP., STOCK	X			11-10-08			X							
	Wm WRIGLEY Co., STOCK		X		10-27-08						X				
	EMERSON ELECTRIC Co, STOCK	X			11-11-08		X								
	EATON VANCE ENHANCED INCOME FD. II		X		12-22-08				X						

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SCHEDULE V— LIABILITIES

Report liabilities of over $10,000 owed to any one creditor ***at any time*** during the reporting period by you, your spouse, or dependent child. Mark the highest amount owed during the year. **Exclude:** Any mortgage on your personal residence (unless it is rented out); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest; and liabilities owed to a spouse, or the child, parent, or sibling of you or your spouse. Report ***revolving charge accounts*** (i.e., credit cards) only if the balance at the close of the preceding calendar year exceeded $10,000.

SP, DC, JT	Creditor	Type of Liability	Amount of Liability									
			B $10,001-$15,000	C $15,001-$50,000	D $50,001-$100,000	E $100,001-$250,000	F $250,001-$500,000	G $500,001-$1,000,000	H $1,000,001-$5,000,000	I $5,000,001-$25,000,000	J $25,000,001-$50,000,000	K Over $50,000,000
	Example: First Bank of Wilmington, Delaware	Mortgage on 123 Main St., Dover, Del.				X						
	MORRILL LYNCH	Loan Secured by Stock							X			

SCHEDULE VI— GIFTS

Report the source, a brief description, and the value of all gifts totalling more than $335 received by you, your spouse, or a dependent child from any source during the year.

Exclude: Gifts from relatives, gifts of personal hospitality of an individual, local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of $134 or less need not be added towards the $335 disclosure threshold.

Note: The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule.

Source	Description	Value
Example: Mr. Joseph H. Smith, Anytown, Anystate	Silver Platter (determination on personal friendship received from Committee on Standards)	$345

Use additional sheets if more space is required.

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SCHEDULE VII — TRAVEL PAYMENTS AND REIMBURSEMENTS

Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totalling more than $335 received by you, your spouse, or a dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense, and the amount of time, if any, that was not at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by you and reimbursed by the sponsor.

Exclude: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to you.

Source		Date(s)	City of Departure—Destination—City of Return	Lodging? (Y/N	Food? (Y/N	Was a Family Member Included? (Y/N)	Number of days not at sponsor's expense
Examples:	Chicago Chamber of Commerce	Mar. 2	DC—Chicago—DC	N	N	N	None
	Roycroft Corporation	Aug. 6–11	DC—Los Angeles—Cleveland	Y	Y	Y	2 Days
Northwestern University		11-13-08	DC-Chicago-DC	N	Y	No	None
Rockefeller Foundation, Metropolitan Planning Council		11-13-08	DC-Chicago-DC	N	Y	No	None

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SCHEDULE VIII—POSITIONS

Report all positions, compensated or uncompensated, held during the current calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, any non profit organization, any labor organization, or any educational or other institution other than the United States.

Exclude: Positions listed on Schedule I; positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

Position	Name of Organization
PARTNER	LLOYD'S UNDERWRITING INSURANCE RISKS, LONDON, ENGLAND
DIRECTOR	SOCIETY INSURANCE (A MUTUAL COMPANY) FOND DU LAC, WISCONSIN

SCHEDULE IX—AGREEMENTS

Identify the date, parties to, and general terms of any agreement or arrangement with respect to: future employment; a leave of absence during the period of government service; *continuation or deferral of payments* by a former or current employer other than the U.S. Government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties To	Terms of Agreement

Use additional sheets if more space is required.