

UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2009 FINANCIAL DISCLOSURE STATEMENT

FORM A
Page 1 of 10
For use by Members, officers, and employees

**HAND
DELIVERED**

Debbie Wasserman Schultz

954-384-2225

(Full Name)

(Daytime Telephone)

2010 JUN 15 PM 4:03

(Office Use Only)

Filer ☒ Member of the U.S. House of Representatives State: FL District: 20

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?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	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)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule I.		If yes, complete and attach Schedule VI.	
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?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	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)?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
If yes, complete and attach Schedule II.		If yes, complete and attach Schedule VII.	
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?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
If yes, complete and attach Schedule III.		If yes, complete and attach Schedule VIII.	
IV. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
If yes, complete and attach Schedule IV.		If yes, complete and attach Schedule IX.	
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.	
If yes, complete and attach Schedule V.			

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 <input type="checkbox"/> No <input checked="" type="checkbox"/>
Exemptions-- 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 <input type="checkbox"/> No <input checked="" type="checkbox"/>

SCHEDULE I - EARNED INCOME

Name Debbie Wasserman Schultz

Page 2 of 10

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$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.

Source	Type	Amount
Community Bank of Broward	Spouse Salary	N/A

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Debbie Wasserman Schultz

Page 3 of 10

BLOCK A		BLOCK B	BLOCK C	BLOCK D	BLOCK E
Asset and/or Income Source		Year-End Value of Asset	Type of Income	Amount of Income	Transaction
<p>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 assets 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.</p> <p>Exclude: Your personal residence(s) (unless there is rental income); any debt owed to you by your spouse, or by your or your spouse's child, parent or sibling; any deposits totaling \$5,000 or less in personal savings accounts; any financial interest in or income derived from U.S. Government retirement programs.</p> <p>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.</p>		<p>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 and is included only because it is generated income, the value should be "None."</p>	<p>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 the calendar year.</p>	<p>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.</p>	<p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
SP	12500shs JBI Inc.	\$1,001 - \$15,000	None	NONE	P
SP	13584shs Community Bank of Broward Common stock	\$100,001 - \$250,000	None	NONE	
SP	401K Retirement Fund JH Energy Fund	None	CAPITAL GAINS	\$1,001 - \$2,500	PS
SP	401K Retirement Fund T Rowe Price Blue Chip Fund	None	CAPITAL GAINS	\$1,001 - \$2,500	PS
SP	401K Retirement Plan JH Money Market Fund	\$15,001 - \$50,000	None	NONE	
SP	401K Retirement Plan Mid Cap Stock Fund	None	CAPITAL GAINS	\$1,001 - \$2,500	PS

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Debbie Wasserman Schultz

Page 4 of 10

SP	401K Retirement Plan Total Stock Market Index Fund	None	CAPITAL GAINS	\$2,501 - \$5,000	PS
SP	401K Retirement Plan 500 Index Fund	None	CAPITAL GAINS	\$1,001 - \$2,500	PS
DC	500shs Community Bank of Broward Common stock	\$1,001 - \$15,000	None	NONE	
JT	Community Bank of Broward- Checking A/C	\$1,001 - \$15,000	None	NONE	

SCHEDULE IV - TRANSACTIONS

Name Debbie Wasserman Schultz

Page 5 of 10

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	Capital Gain in Excess of \$200?	Date	Amount of Transaction
SP	12500shs JBI Inc.	P	N/A	12-28-09	\$1,001 - \$15,000
SP	401K Retirement Fund 500 Index Fund	P	N/A	07-31-09	\$1,001 - \$15,000
SP	401K Retirement Fund JH Energy Fund	P	N/A	05-07-09	\$1,001 - \$15,000
SP	401K Retirement Fund Mid Cap Stock Fund	P	N/A	07-31-09	\$1,001 - \$15,000
SP	401K Retirement Fund Small Cap Index Fund	P	N/A	07-31-09	\$1,001 - \$15,000
SP	401K Retirement Fund T Rowe Price Blue Chip Fund	P	N/A	05-07-09	\$1,001 - \$15,000
SP	401K Retirement Fund T Rowe Price Blue Chip Fund	P	N/A	07-31-09	\$1,001 - \$15,000
SP	401K Retirement Fund Total Stock Market Index Fund	P	N/A	07-31-09	\$1,001 - \$15,000
SP	401K Retirement Plan 500 Index Fund	S	Yes	12-01-09	\$1,001 - \$15,000
SP	401K Retirement Plan Blue Chip Growth Fund	P	N/A	10-23-09	\$1,001 - \$15,000
SP	401K Retirement Plan Blue Chip Growth Fund	S	No	12-01-09	\$1,001 - \$15,000

SCHEDULE IV - TRANSACTIONS

Name Debbie Wasserman Schultz

Page 6 of 10

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	Capital Gain in Excess of \$200?	Date	Amount of Transaction
SP	401K Retirement Plan JH Energy Fund	S	Yes	12-01-09	\$1,001 - \$15,000
SP	401K Retirement Plan JH Energy Fund	P	N/A	07-31-09	\$1,001 - \$15,000
SP	401K Retirement Plan Mid Cap Stock Fund	S	Yes	12-01-09	\$1,001 - \$15,000
SP	401K Retirement Plan Mid Cap Stock Fund	P	N/A	05-07-09	\$1,001 - \$15,000
SP	401K Retirement Plan Small Cap Index Fund	S	No	12-01-09	\$1,001 - \$15,000
SP	401K Retirement Plan T Rowe Price Blue Chip Fund	S	Yes	10-23-09	\$1,001 - \$15,000
SP	401K Retirement Plan Total Stock Market Fund	S	Yes	12-01-09	\$1,001 - \$15,000
SP	401K Retirement Plan Total Stock Market Index Fund	P	N/A	05-07-09	\$15,001 - \$50,000
SP	401K Retirement Plan 500 Index Fund	P	N/A	05-07-09	\$1,001 - \$15,000

SCHEDULE V - LIABILITIES

Name Debbie Wasserman Schultz

Page 7 of 10

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 all or part of it is rented out); loans secured by automobiles, household furniture, or appliances; 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
JT	Wachovia Bank N.A.	Revolving Charge A/C	\$15,001 - \$50,000
JT	Independent Bankers Bank	Personal Loan	\$100,001 - \$250,000
JT	MBNA	Revolving Charge A/C	\$15,001 - \$50,000

SCHEDULE VII - TRAVEL PAYMENTS AND REIMBURSEMENTS

Name Debbie Wasserman Schultz

Page 8 of 10

Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling 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 reimbursed or paid directly 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)	Point of Departure-- Destination--Point of Return	Lodging? (Y/N)	Food? (Y/N)	Was a Family Member Included? (Y/N)	Days not at sponsor's expense
ABC'S "Good Morning America"	March 22- 23	Miami, FL-NYC-DC	Y	Y	N	None
Michigan Assoc. Of Justice	May 9-10	FT lauderdale, FL-Michigan- FT Lauderdale	Y	Y	N	None
American Israel Public Affairs	May 20-21	DC-NYC-DC	Y	N	N	None
Hadassah of Greater Baltimore	Sept. 10	DC-Pikesville, MD-DC	N	N	N	None
Charlottesville Hadassah	Dec 6-7	DC-Charlottesville, VA-DC	Y	Y	N	None

SCHEDULE VIII - POSITIONS

Name Debbie Wasserman Schultz

Page 9 of 10

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 any business enterprise, any nonprofit organization, any labor organization, or any educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities; positions solely of an honorary nature; and positions listed on Schedule I.

Position	Name of Organization
Director	National Safety Council

SCHEDULE IX - AGREEMENTS

Name **Debbie Wasserman Schultz**

Page 10 of 10

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
11-01-2004	State of Florida	Defined Benefit Pension Plan. Projected monthly retirement benefit at age 62 to be determined