

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

Name: Hon. John Shimkus

Status: Member State/District: IL15

# FILING INFORMATION

Filing Type: Annual Report

Filing Year: 2016

**Filing Date:** 05/15/2017

# SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?	
440 Spring Street, Collinsville/Madison, IL, US	JT	\$50,001 - \$100,000	Rental Property	None		
LOCATION: Collinsville/Madison, IL, US						
690 9th Street, SW, Washington, DC, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000		
LOCATION: Washington, DC, US DESCRIPTION: Rent from 2nd home located in Washington, DC						
American Century Growth Fund	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000		
Flexible Premium Deferred Variable Annuity ⇒ Flexible Premium Deferred Variable Annuity		\$100,001 - \$250,000	Dividends	None		
Description: The mutual fund Allocation Portfolio is listed at Mod Aggressive Alloc The fund lost 1.98% during 2015 for an end of the year balance of \$97,101 in the account.						
Lutheran Church Extension Fund	DC	None	Interest	None		
Description: This account was cashed out in order to purchase an automobile for an adult son.						
NW LGCAP	JT	\$15,001 - \$50,000	Interest	None		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Putnam Health Services Trust	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
Thrivent Market Fund	JT	\$1,001 - \$15,000	Dividends	None	

<sup>\*</sup> Asset class details available at the bottom of this form.

# SCHEDULE B: TRANSACTIONS

None disclosed.

# SCHEDULE C: EARNED INCOME

Source	Туре	Amount
The George Washington University	Teaching and lecturing work for The Graduate School of Political Management	\$5,000.00
Holy Cross Lutheran Church	Spouse Salary	\$54,300.00

# SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Туре	Amount of Liability
JT	USAA Federal Savings Bank, Lake Zurich, IL	March, 2011	Mortgage on 690 9th Street SW, Washington, DC	\$250,001 - \$500,000
DC	NelNet Student Loans	August, 2011	Student Loan	\$10,000 - \$15,000
DC	Fed Loan Servicing Account	August, 2013	Student Loan	\$10,000 - \$15,000
JT	Bank of Edwardsville	March 2014	Construction Loan	\$15,001 - \$50,000

# **S**CHEDULE **E**: **P**OSITIONS

None disclosed.

# 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

• Flexible Premium Deferred Variable Annuity

## 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?

C 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

#### **COMMENTS**

Under assets, one of the Putnam Health Services Trust accounts is no longer reported here as the child turned 21 and is no longer considered a dependent.

## **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. John Shimkus, 05/15/2017