



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Suzanne Bonamici
Status: Member
State/District: OR01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2017
Filing Date: 05/30/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Managed Asset Account ⇒ Blackrock High Yield Bond Investor CLA [MF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Blackrock Strategic Inc. Oppty Investor CLA [MF]	JT	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Intl Value CLA [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Municipal High Inc. CLA [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value CLA [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒	JT	\$15,001 - \$50,000	Capital Gains,	\$1,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Multi Manager Directional Alt. Strat [MF]			Dividends	\$2,500	
Ameriprise Managed Asset Account ⇒ Multi Manager Growth Strategies [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Small Cap Equity Strategies [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Total Return Bond Strategies [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Value Strategies [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Nuveen Interm. Duration Mun. Bond CLA [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl Growth CLA [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Prudential Jennison Mid Cap Growth CLA [MF]	JT	\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CLA [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Short Term Municipal Bond CLA [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Special Mid Cap Value CLA [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Michael H. Simon Beneficiary IRA at Ameriprise ⇒ Ameriprise Cash Holding [BA]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Michael H. Simon Royalties ⇒ International Authors Society ("Odd Couple" Royalties) [OT]	SP	\$15,001 - \$50,000	Royalties	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Royalties from "Odd Couple" in 2017.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Michael H. Simon Royalties ⇒ Samuel French, Inc. ("Odd Couple" Royalties) [OT] DESCRIPTION: Royalties from "Odd Couple" in 2017.	SP	\$15,001 - \$50,000	Royalties	\$5,001 - \$15,000	<input type="checkbox"/>
Michael H. Simon Royalties ⇒ Tams-Witmark Music Library, Inc. ("Promises, Promises" Royalties) [OT] DESCRIPTION: Royalties from "Promises, Promises" in 2016.	SP	\$1,001 - \$15,000	Royalties	\$1,001 - \$2,500	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Ameriprise Cash Holding [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Gold Coins [OT] DESCRIPTION: Gold coins.	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Innsmouth Partners, LLC (motion picture production company; Hillsboro, OR; holds no investments) [OT] DESCRIPTION: Location: Hillsboro / Washington County, OR, US Description: Motion picture production company; Hillsboro, OR; holds no investments COMMENTS: [Effective July 24, 2017, we returned our interest in this LLC to the LLC without any gain or return on our investment.]	JT	None	None		<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Northwestern Mutual Life Ins. (life ins. cash value) [OT] DESCRIPTION: Cash value of Northwestern Mutual Life Insurance policy.	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Oregon State Dept. of Admin. Services, Municipal Bond [CS] DESCRIPTION: Oregon State Department of Administrative Services Municipal Bond.	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ U.S. Bank NA (checking and savings accounts) [BA] DESCRIPTION: Checking and savings accounts.	JT	\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ U.S. Bank NA (checking and savings accounts) [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Suzanne's Personal Assets ⇒ Franklin Growth Alloc. CLA mutual fund (held in Suzanne's personal IRA at Ameriprise) [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Suzanne's Personal Assets ⇒ OnPoint Community Credit Union (check and savings) [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index mutual fund [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Energy mutual fund [MF]	SP	None	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Interm. Term Corp. Bond Inndex [MF]	SP	\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP mutual fund [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard REIT Index mutual fund [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Small Cap Index mutual fund [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Blackrock High Yield Bond [MF]	JT	08/25/2017	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Blackrock Strategic Inc. Oppty Inv. [MF]	JT	01/24/2017	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [MF]	JT	01/24/2017	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [MF]	JT	08/25/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	01/24/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	04/20/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒	JT	08/25/2017	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPMorgan Large Cap Growth [MF]					
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	11/16/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Intl Value [MF]	JT	01/24/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Intl Value [MF]	JT	04/20/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Intl Value [MF]	JT	08/25/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MFS Intl Value [MF]	JT	11/16/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Municipal High Inc. CLA [MF]	JT	01/24/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MFS Municipal High Inc. CLA [MF]	JT	08/25/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value [MF]	JT	01/24/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Direct Alt Strategies [MF]	JT	01/24/2017	S (partial)	\$595.00	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Direct Alt Strategies [MF]	JT	04/20/2017	P	\$536.00	
Ameriprise Managed Asset Account ⇒ Multi Manager Growth Strategies [MF]	JT	01/24/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Growth Strategies [MF]	JT	04/20/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Growth Strategies [MF]	JT	08/25/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Growth Strategies [MF]	JT	11/16/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Multi Manager Small Cap Equity Strategies [MF]	JT	01/24/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Small Cap Equity Strategies [MF]	JT	04/20/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Small Cap Equity Strategies [MF]	JT	08/25/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Small Cap Equity Strategies [MF]	JT	11/16/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Total Return Bond Strategies [MF]	JT	01/24/2017	P	\$50,001 - \$100,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Total Return Bond Strategies [MF]	JT	08/25/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Total Return Bond Strategies [MF]	JT	11/16/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Value Strategies [MF]	JT	01/24/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Value Strategies [MF]	JT	08/25/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Value Strategies [MF]	JT	11/16/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Nuveen Intern. Duration Mun. Bond [MF]	JT	01/24/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Nuveen Intern. Duration Mun. Bond [MF]	JT	08/25/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Nuveen Intern. Duration Mun. Bond [MF]	JT	11/16/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl. Growth [MF]	JT	01/24/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl. Growth [MF]	JT	04/20/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl. Growth [MF]	JT	08/25/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Prudential Jennison Mid Cap Growth [MF]	JT	01/24/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Emerging Markets Equity [MF]	JT	01/24/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Emerging Markets Equity [MF]	JT	04/20/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Emerging Markets Equity [MF]	JT	08/25/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Short Term Municipal bond [MF]	JT	01/24/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Short Term Municipal bond [MF]	JT	08/25/2017	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Short Term Municipal bond [MF]	JT	11/16/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Wells Fargo Special Mid Cap Value [MF]	JT	01/24/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Special Mid Cap Value [MF]	JT	08/25/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA [MF]	JT	01/24/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA [MF]	JT	04/20/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA [MF]	JT	08/25/2017	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA [MF]	JT	11/16/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index Mutual Fund [MF]	SP	01/30/2017	P	\$15,001 - \$50,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index Mutual Fund [MF]	SP	01/31/2017	S (partial)	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Energy mutual fun [MF]	SP	01/30/2017	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Interm Term Corp Index [MF]	SP	01/31/2017	P	\$500,001 - \$1,000,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP mutual fund [MF]	SP	01/30/2017	P	\$15,001 - \$50,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard REIT Index mutual fund [MF]	SP	01/31/2017	S (partial)	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Small Cap Index mutual fund [MF]	SP	01/30/2017	P	\$100,001 - \$250,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Small Cap Index mutual fund [MF]	SP	01/31/2017	S (partial)	\$250,001 - \$500,000	<input checked="" type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
United States Judges (Administrative Office of the U.S. Courts)	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Member (minority interest; no control or managerial responsibility)	Innsmouth Partners, LLC (motion picture production company; Hillsboro, OR; holds no investments)

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
U.S. Association of Former Members of Congress; SPFUSA	02/18/2017	02/25/2017	Washington D.C. - Tokyo - Nagoya - Washington D.C.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- o Ameriprise Managed Asset Account (Owner: JT)
LOCATION: US
- o Michael H. Simon Beneficiary IRA at Ameriprise (Owner: SP)
LOCATION: US
- o Michael H. Simon Royalties (Owner: SP)
LOCATION: US
- o Miscellaneous Assets Jointly Owned (Owner: JT)
LOCATION: US
- o Suzanne's Personal Assets
LOCATION: US
- o The Michael H. Simon Rollover IRA at Vanguard (Owner: SP)
LOCATION: US

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. Suzanne Bonamici , 05/30/2018