



Filing ID #10001458

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Mr. Pete Olson  
**Status:** Member  
**State/District:** TX22

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2013  
**Filing Date:** 05/14/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
529 Excepted Trust		\$250,001 - \$500,000	None		<input type="checkbox"/>
DESCRIPTION: 529 College Saving Plan for dependent child owned and established by child's grandparents.					
529 Excepted Trust		\$250,001 - \$500,000	None		<input type="checkbox"/>
DESCRIPTION: 529 College Saving Plan for dependent child owned and established by child's grandparents.					
Bank of America Accounts		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Blackrock Latin America (MALTX)		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Brea Canon Oil Co., Inc.		Undetermined	Royalties	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: No readily ascertainable value. No established market price or statements received.					
Columbia Portfolio Builder Moderate Aggressive Fund Class A (AXMAX)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DFA International Small Company (DFISX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DFA One Year Fixed Income (DFIHX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Canada Fund (FICDX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Floating Rate High Income Fund (FFRHX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
IRA ⇒ Janus Triton Class A (JGMAX)		\$15,001 - \$50,000	Tax-Deferred	None	<input checked="" type="checkbox"/>
IRA ⇒ Lord Abbett Bond Debenture Fund Class A (LBNDX)		None	Tax-Deferred	None	<input checked="" type="checkbox"/>
IRA ⇒ Lord Abbett Mid Cap Stock Class A (LAVLX)		None	Tax-Deferred	None	<input checked="" type="checkbox"/>
IRA ⇒ Morgan Stanley International Real Estate Class I (MSUAX)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Morgan Stanley US Real Estate Portfolio I (MSUSX)		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ T Rowe Price New Era Fund (PRNEX)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ US Global Inv Global Resources Fund (PSPFX)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Vanguard Euro Stock Index Fund Signal Shares (VESSX)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Vanguard REIT Index Fund Signal (VGRSX)		\$1,001 - \$15,000	Tax-Deferred	None	<input checked="" type="checkbox"/>
IShares Core S&P Small Cap Fund (IJR)		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IShares MSCI Australia Index Fund (EWA)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
IShares MSCI Japan Index (EWJ)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JP Morgan Small Cap Value Fund Select (PSOPX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan Tax Aware Real (TXRIX)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan US Real Estate (SUIEX)		None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Matthews Asia Small Companies Fund (MSMLX)		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Matthews Pacific Tiger Fund (MAPTX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merger Fund (MERFX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley International Real Estate Class I (MSUAX)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley US Real Estate Portfolio I (MSUSX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Oakmark International Small Cap Fund (OAKEX)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Peter G. Olson Excepted Trust		Undetermined	Excepted/Blind Trust	\$15,001 - \$50,000	<input type="checkbox"/>
RiverSource Variable Universal Life Insurance		\$15,001 - \$50,000	None		<input type="checkbox"/>
Royce Premier Fund (RYP1Z)		\$1 - \$1,000	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
Royce Premier Fund (RYPRX)		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Royce Total Return Fund (RYR1Z)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Schwab Advance Cash Reserve (SWQXX)		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Signal Hill Petroleum Inc.		Undetermined	Royalties	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: No readily ascertainable value. No established market price or statements received.					
SPDR S&P 500 (SPY)		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
T Rowe Price International Discovery Fund (PRIDX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
T Rowe Price New Asia Fund (PRASX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
T Rowe Price New Era Fund (PRNEX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
US Global Inv Global Resources Fund (PSPFX)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Energy Fund Admiral Shares (VGELX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Euro Stock Index Fund Signal Shares (VESSX)		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard REIT Index Fund Signal (VGRSX)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard Short Term Tax Exempt Admiral Share (VWSUX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<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?
Blackrock Latin America (MALTX)		11/27/2013	P	\$1,001 - \$15,000	
Fidelity Canada Fund (FICDX)		04/22/2103	P	\$1,001 - \$15,000	
Fidelity Floating Rate High Income Fund (FFRHX)		12/2/2013	P	\$1,001 - \$15,000	
Fidelity Floating Rate High Income Fund (FFRHX)		04/22/2103	P	\$1,001 - \$15,000	
IRA ⇒		07/24/2013	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Janus Triton Class A (JGMAX)					
IRA ⇒ Lord Abbett Bond Debenture Fund Class A (LBNDX)		07/23/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ Lord Abbett Mid Cap Stock Class A (LAVLX)		07/23/2013	S	\$15,001 - \$50,000	<input type="checkbox"/>
IRA ⇒ Vanguard REIT Index Fund Signal (VGRSX)		11/29/2013	P	\$1,001 - \$15,000	
IShares Core S&P ETF (IJR)		11/27/2013	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IShares MSCI Japan Index (EWJ)		04/22/2103	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
JP Morgan US Real Estate (SUIEX)		11/27/2103	S	\$1,001 - \$15,000	<input type="checkbox"/>
JP Morgan US Real Estate (SUIEX)		04/22/2103	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Merger Fund (MERFX)		11/27/2013	P	\$1,001 - \$15,000	
Oakmark International Small Cap Fund (OAKEX)		04/22/2103	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Royce Premier Fund (RYP1Z)		04/22/2103	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Royce Premier Fund (RYPRX)		11/27/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Royce Total Return Fund (RYR1Z)		11/27/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Royce Total Return Fund (RYR1Z)		04/22/2013	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
SPDR S&P 500 (SPY)		11/27/2013	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
SPDR S&P 500 (SPY)		04/22/2103	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
			(partial)		
Vanguard Energy Fund Admiral Shares (VGELX)		04/22/2103	P	\$1,001 - \$15,000	
Vanguard Euro Stock Index Fund Signal Shares (VESSX)		04/22/2103	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard REIT Index Fund Signal (VGRSX)		11/27/2013	P	\$15,001 - \$50,000	

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

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

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

◦ IRA
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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

## COMMENTS

## 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:** Mr. Pete Olson , 05/14/2014