

UNITED STATES HOUSE OF REPRESENTATIVES

FORM A

Page 1 of 6

CALENDAR YEAR 2008 FINANCIAL DISCLOSURE STATEMENT

For use by Members, officers, and employees

HAND DELIVERED

Joseph S. Donnelly  
(Full Name)

574-288-2780  
(Daytime Telephone)

2009 MAY 14 PM 2:00

LEGISLATIVE RESOURCE CENTER

Filer  Member of the U.S. House of Representatives  
State: IN District: 02

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

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

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

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

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

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

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?  
If yes, complete and attach Schedule IV. Yes  No

IX. Did you have any reportable agreement or arrangement with an outside entity?  
If yes, complete and attach Schedule IX. 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

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

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  No

**SCHEDULE I - EARNED INCOME**

Name Joseph S. Donnelly

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
Univ. Of Notre Dame	Spouse Salary	N/A

**SCHEDULE III - ASSETS AND "UNEARNED" INCOME**

Name Joseph S. Donnelly

BLOCK A <b>Asset and/or Income Source</b> 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.  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.  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 <b>Year-End Value of Asset</b> 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."	BLOCK C <b>Type of Income</b> 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.	BLOCK D <b>Amount of Income</b> 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 <b>Transaction</b> Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.
JT 1930 Lakeshore Drive, Michigan City, IN	\$500,001 - \$1,000,000	NONE	NONE	
SP Fidelity IRA, Dividend Growth Fund	\$15,001 - \$50,000	DIVIDENDS/INTE REST	NONE	
Fidelity IRA, Money Market Fund	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
JT IBM Stock	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
SP Manulife Financial	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
Notre Dame Credit Union IRA, Money Market Fund	\$1,001 - \$15,000	INTEREST	\$1 - \$200	

**SCHEDULE III - ASSETS AND "UNEARNED" INCOME**

Name Joseph S. Donnelly

Page 4 of 6

SP	Notre Dame Credit Union IRA, Money Market Fund	\$1,001 - \$15,000	INTEREST	\$1 - \$200
JT	Notre Dame Credit Union Savings Account	\$1,001 - \$15,000	INTEREST	\$1 - \$200
SP	TIAA-CREF IRA Account, Growth & Income Fund	\$50,001 - \$100,000	DIVIDENDS/INTE REST	NONE

# SCHEDULE V - LIABILITIES

Name Joseph S. Donnelly

Page 5 of 6

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	Chase Home Loan Mortgage	Mortgage on 1930 Lakeshore Drive, Michigan City, IN	\$250,001 - \$500,000
JT	Bank of America	Credit Card Payment	\$15,001 - \$50,000
	Notre Dame Credit Union	Personal Loan	\$15,001 - \$50,000

**FOOTNOTES**

Name Joseph S. Donnelly

Page 6 of 6

Number	Section / Schedule	Footnote	This note refers to the following item
1	Schedule V	First Horizon Home Mortgage transferred ownership of the mortgage on 1930 Lakeshore Drive to Chase Home Loan Mortgage.	