



Filing ID #10002334

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Mr. Timothy J. Walz
Status: Member
State/District: MN01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2013
Filing Date: 05/15/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Balanced Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
LOCATION: MN					
DESCRIPTION: Education 529 Plan					
Education Minnesota, Not Self Directed		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Retirement					
Education Minnesota, Not Self Directed	SP	\$15,001 - \$50,000	Interest	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Retirement					
Mass Mutual Life Ins/Mass Mutual (whole)		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Life Insurance					
MN Retirement Assn Not Self Directed		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Retirement					
MN Retirement Assn Not Self Directed	SP	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Retirement					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual Life Ins (whole)	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Life Insurance					
Remainder Interest in Family Farm, Boyd County, NE		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Family Farm					
Rental Unit-12 Valley View Place Mankato MN	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Previously reported income on rental unit which is a part of homestead property is no longer rented					

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
American United Life Ins Co/Mass Mutual (Whole)		Bi-weekly	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: Life Insurance					
Education Minnesota, Not Self Directed	SP	Bi-weekly	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: 403(b)Retirement Plan					

SCHEDULE C: EARNED INCOME

Source	Type	Amount
ISD 77 Mankato MN	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Suntrust Mortgage Inc	November 2013	Homestead Mortgage	\$100,001 - \$250,000
JT	Chase Credit Card	Revolving	Credit Card	\$15,001 - \$50,000
JT	MBNA-Bank of America	Revolving	Credit Card	\$10,000 - \$15,000
JT	American Express	Revolving	Credit Card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2010	Tim Walz and Mankato Area Public Schools	Leave without pay agreement ended January 18,2013
December 2010	Tim Walz and MN Teahers Retirement Assn, not self directed	Leave without pay agreement ended January 18, 2013

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.

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. Timothy J. Walz , 05/15/2014