



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** S Duane Stroebel Jr  
**Status:** Congressional Candidate  
**State/District:** WI06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2014  
**Filing Date:** 05/19/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AT&T Retirement Savings Plan ⇒ AT& T Asset Fund		\$1,001 - \$15,000	Tax-Deferred	None	None
AT&T Retirement Savings Plan ⇒ Dividend Fund Acct		\$1 - \$1,000	Tax-Deferred	None	None
AT&T Retirement Savings Plan ⇒ Lg Cap US Stock Index		\$50,001 - \$100,000	Tax-Deferred	None	None
AT&T Retirement Savings Plan ⇒ Sm & Mid US Stk Index		\$15,001 - \$50,000	Tax-Deferred	None	None
Automobiles DESCRIPTION: Automobiles		\$15,001 - \$50,000	None		
Cedarburg Seniors Apartments II LLC LOCATION: Cedarburg, WI, US DESCRIPTION: Senior Housing Partnership		\$1,000,001 - \$5,000,000	Partnership Income	\$5,001 - \$15,000	\$15,001 - \$50,000
Cornerstone Community Bank		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
CSM 3708 Land  LOCATION: Cedarburg, WI, US		\$250,001 - \$500,000	None		
CUNA Life Insurance		\$1,001 - \$15,000	None		
Development Ventures  LOCATION: Cedarburg, WI, US DESCRIPTION: Real Estate Development		None	Partnership Income	None	\$100,001 - \$1,000,000
Evergreen Blvd Lots  LOCATION: Cedarburg, WI, US		\$250,001 - \$500,000	None		
Harris Bank Accounts		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
John Hancock Life Insurance		\$50,001 - \$100,000	None		
Kaehlers Mill Land  LOCATION: Cedarburg, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...		\$500,001 - \$1,000,000	Rent	\$201 - \$1,000	\$1,001 - \$2,500
Land-Hwy 60  LOCATION: Cedarburg, WI, US		\$100,001 - \$250,000	None		
Laura Stroebel Simple IRA ⇒ Cash and Equivalents		\$1 - \$1,000	Tax-Deferred	None	None
Laura Stroebel Simple IRA ⇒ Manning & Napier Pro-Blend		\$1,001 - \$15,000	Tax-Deferred	None	None
Lincoln Court Development ⇒ Rental-Cedar Grove  LOCATION: Cedar Grove, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	\$100,001 - \$1,000,000
Lincoln Court Development ⇒		\$1,000,001 -	Rent	\$15,001 - \$50,000	\$100,001 - \$1,000,000

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Rental-First Avenue		\$5,000,000			
LOCATION: Grafton, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Lincoln Court Development ⇒ Rental-Saukville		\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$100,001 - \$1,000,000
LOCATION: Saukville, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Mequon Senior Housing LLC		\$500,001 - \$1,000,000	Partnership Income	\$1,001 - \$2,500	\$2,501 - \$5,000
LOCATION: Mequon, WI, US DESCRIPTION: Senior Housing Partnership					
Northwestern Mutual Life		\$15,001 - \$50,000	None		
Pleasant Valley Preserve		\$1,000,001 - \$5,000,000	Partnership Income	None	None
LOCATION: Cedarburg, WI, US DESCRIPTION: Real Estate Development					
Rental-Beaver Dam		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$100,001 - \$1,000,000
LOCATION: Beaver Dam, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-Covered Bridge Rd Land		\$500,001 - \$1,000,000	Rent	\$201 - \$1,000	\$2,501 - \$5,000
LOCATION: Cedarburg, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-Covered Bridge Road Lot		\$100,001 - \$250,000	None		
LOCATION: Cedarburg, WI, US					
Rental-Devon		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Saukville, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Rental-Dries Apartments		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	\$100,001 - \$1,000,000
LOCATION: Saukville, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-East		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$50,001 - \$100,000
LOCATION: Appleton, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-Evergreen Park I		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
LOCATION: Cedarburg, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-Floral		\$250,001 - \$500,000	Rent	\$1,001 - \$2,500	\$2,501 - \$5,000
LOCATION: Cedarburg, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-Heather		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	\$50,001 - \$100,000
LOCATION: Milwaukee, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-Hwy I Land		\$250,001 - \$500,000	Rent	\$201 - \$1,000	\$1,001 - \$2,500
LOCATION: Cedarburg, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-Kloehn Land		\$500,001 - \$1,000,000	Rent	\$1,001 - \$2,500	\$2,501 - \$5,000
LOCATION: Cedarburg, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental--Mill Street		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	\$100,001 - \$1,000,000
LOCATION: Saukville, WI, US					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Rental-Office		\$250,001 - \$500,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
<p>LOCATION: Cedarburg, WI, US</p> <p>COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...</p>					
Rental-Pioneer Road House		\$250,001 - \$500,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
<p>LOCATION: Cedarburg, WI, US</p> <p>COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...</p>					
Rental-Pleasant Valley Thomas Land		\$1,000,001 - \$5,000,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
<p>LOCATION: Cedarburg, WI, US</p> <p>COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...</p>					
Rental-Port Washington Road		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
<p>LOCATION: Grafton, WI, US</p> <p>COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...</p>					
Rental-Prospect		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	\$100,001 - \$1,000,000
<p>LOCATION: Milwaukee, WI, US</p> <p>COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...</p>					
Rental-Stone Bldg		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
<p>LOCATION: Cedarburg, WI, US</p> <p>COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...</p>					
Rental-Stowell		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$50,001 - \$100,000
<p>LOCATION: Milwaukee, WI, US</p> <p>COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...</p>					
Rental-Washington Court		\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$100,001 - \$1,000,000
<p>LOCATION: Cedarburg, WI, US</p> <p>COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes,</p>					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
mortgage payments, maintenance, etc...					
Rental-Western Dr		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Hartford, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-Wittenberg		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$50,001 - \$100,000
LOCATION: Cedarburg, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
Rental-Woodmere		\$5,000,001 - \$25,000,000	Rent	\$100,001 - \$1,000,000	\$1,000,001 - \$5,000,000
LOCATION: Cedarburg, WI, US COMMENTS: The amount of income represents Gross Rent and does NOT take into account any expenses of rental property such as utilities, taxes, mortgage payments, maintenance, etc...					
S. Duane Stroebel, Jr. Simple IRA ⇒ Cash & Equivalents		\$1 - \$1,000	Tax-Deferred	None	None
S. Duane Stroebel, Jr. Simple IRA ⇒ Manning & Napier Pro-Blend		\$15,001 - \$50,000	Tax-Deferred	None	None
Sheboygan Road Land		\$500,001 - \$1,000,000	Rent	\$201 - \$1,000	\$1,001 - \$2,500
LOCATION: Cedarburg, WI, US					
Terrace Realty		\$1 - \$1,000	S Corp Income	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Cedarburg, WI, US DESCRIPTION: Property Management					
U. S. Savings Bonds		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000

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

## **SCHEDULE C: EARNED INCOME**

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
Terrace Realty	Salary	\$20,000	\$20,000
Real Estate Sales	Commissions		\$13,661
Cedarburg School District	School Board	N/A	\$150
Wisconsin State Assembly	State Representative	\$15,500	\$46,500.52
Home Buyer	Sale of House	N/A	\$12,046
Cedarburg Seniors Apartments II LLC	Managment Fee	\$94,516	
Mequon Senior Housing LLC	Management Fee	\$28,923	

#### **SCHEDULE D: LIABILITIES**

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
	Chase Bank	2007	Mortgage-Woodmere	\$5,000,001 - \$25,000,000
	Bank Mutual	2009	Mortgage-Evergreen Park I	\$1,000,001 - \$5,000,000
	Chase Bank	2011	Mortgage-Prospect	\$1,000,001 - \$5,000,000
	Chase Bank	2004	Mortgage-Mill Street	\$500,001 - \$1,000,000
	Pyramax Bank	2012	Mortgage-Beaver Dam	\$500,001 - \$1,000,000
	Pyramax Bank	2012	Mortgage-Dries Apartments	\$500,001 - \$1,000,000
	Pyramax Bank	2012	Mortgage-East	\$250,001 - \$500,000
	Pyramax Bank	2013	Mortgage-Stowell	\$250,001 - \$500,000
	Harris Bank	2006	Mortgage-Devon	\$100,001 - \$250,000
	Cornerstone Community Bank	1999	Mortgage-Wittenberg	\$250,001 - \$500,000
	Harris Bank	2009	Mortgage-Stone Bldg	\$250,001 - \$500,000

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
	Cornerstone Community Bank	2008	Mortgage-Office	\$250,001 - \$500,000
	Harris Bank	2006	Mortgage-Floral	\$100,001 - \$250,000
	Harris Bank	1999	Mortgage-Western Dr.	\$100,001 - \$250,000
	Cornerstone Community Bank	2000	Mortgage-Heather	\$500,001 - \$1,000,000
	Cornerstone Community Bank	2005	Mortgage-Port Washington Road	\$250,001 - \$500,000
	Cornerstone Community Bank	2007	Mortgage-Covered Bridge Road Land	\$250,001 - \$500,000
	Cornerstone Community Bank	2007	Mortgage-Highway I Land	\$250,001 - \$500,000
	Cornerstone Community Bank	2008	Mortgage-CSM 3708 Land	\$100,001 - \$250,000
	Port Washington State Bank	2008	Mortgage-Evergreen Blvd Lots	\$100,001 - \$250,000
	Cornerstone Community Bank	2008	Mortgage-Kaehlers Mill Land	\$250,001 - \$500,000
	Pyramax Bank	2011	Mortgage-Saukville	\$1,000,001 - \$5,000,000
	Pyramax Bank	2011	Mortgage-First Avenue	\$500,001 - \$1,000,000
	Pyramax Bank	2011	Mortgage-Cedar Grove	\$500,001 - \$1,000,000
	Bank Mutual	2012	Mortgage-Washington Court	\$500,001 - \$1,000,000
	Harris Bank	2013	Mortgage-Pleasant Valley Preserve	\$250,001 - \$500,000

## **SCHEDULE E: POSITIONS**

<b>Position</b>	<b>Name of Organization</b>
Managing Member	Cedarburg Seniors Apartments II LLC
Managing Member	Mequon Senior Housinig, LLC
Officer	Terrace Realty, Inc.

Position	Name of Organization
Managing Member	Pleasant Valley Preserve LLC
Managing Member	Development Ventures LLC
Managing Member	Lincoln Court Development LLC
Board Member	Cedarburg Art Museum

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2011	Myself & State of Wisconsin	Legislative Pension Plan Participation

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> <li>o AT&amp;T Retirement Savings Plan</li> <li>o Laura Stroebel Simple IRA</li> <li>o Lincoln Court Development LOCATION: US</li> <li>o S. Duane Stroebel, Jr. Simple IRA</li> </ul>
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## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**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:** S Duane Stroebel Jr, 05/19/2014