LOUISIANA ETHICS ADMINISTRATION CAMPAIGN FINANCE RECEIVED

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LOUISIANA BOARD OF ETHICS
Post Office Box 4368
Baton Rouge, Louisiana 70821

TIER 1 PERSONAL FINANCIAL DISCLOSURE STATEMENT
(ANNUAL)

☒ ORIGINAL REPORT
☐ AMENDED REPORT

This Report Covers Calendar Year: 2011

☐ I currently hold an office that would require me to file a Tier 2, Tier 2.1, or Tier 3 Personal Financial Disclosure Statement. As such, I have completed SCHEDULE K.

Office/Position Held: Governor

Name of Filer (print full name) Bobby Jindal

Address (residence) 1001 Capitol Access Road

City, State, Zip Baton Rouge, LA 70802

HAND DELIVERED

Name of Spouse (print full name) Supriya Jindal

Spouse's Occupation First Lady

Principal Business Address 1001 Capitol Access Road

City, State, Zip Baton Rouge, LA 70802

Check all that apply:

☒ I have filed my state income tax return for the previous year.

☐ I have filed for an extension of my state income tax return for the previous year.

☒ I have filed my federal income tax return for the previous year.

☐ I have filed for an extension of my federal income tax return for the previous year.

NOTE: La. R.S. 42:1124.1 does not provide you the opportunity to request an extension in filing your personal financial disclosure statement.

Certification of Accuracy

I do hereby certify, after having been duly sworn, that the information contained in this personal financial disclosure statement is true and correct to the best of my knowledge, information, and belief.

Signature of Filer

Sworn to and subscribed before me this 14th day of May, 2012.

Elizabeth Murrill
Notary Public (print name)

Notary Public (signature)

ID# Bar Roll # 20685

Date Commission Expires at death

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Schedule A: Employment Information

☐ Check if not applicable

☒ Filer ☐ Spouse ☒ Full-Time ☐ Part-Time

Name of Employer: State of Louisiana

Job Title: Governor

Job Description: Chief executive officer

☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time

Name of Employer:

Job Title:

Job Description:

☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time

Name of Employer:

Job Title:

Job Description:

☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time

Name of Employer:

Job Title:

Job Description:

- **You are required to complete SCHEDULE A to disclose employment information related to both you and your spouse.**
- **List the name of the employer; the title of the position; a brief description of the job; and disclosure as to whether the position is full-time or part-time.**

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Schedule B: Positions - Business

☒ Check if not applicable

☐ Filer ☐ Spouse ☐ Both
Amount of Interest (where interest exceeds 10%): ________ %
Name of Business: ________
Address: ________
City, State, Zip: ________
Business Description: ________
Nature of Association: ________

☐ Filer ☐ Spouse ☐ Both
Amount of Interest (where interest exceeds 10%): ________ %
Name of Business: ________
Address: ________
City, State, Zip: ________
Business Description: ________
Nature of Association: ________

☐ Filer ☐ Spouse ☐ Both
Amount of Interest (where interest exceeds 10%): ________ %
Name of Business: ________
Address: ________
City, State, Zip: ________
Business Description: ________
Nature of Association: ________

*** You are required to complete SCHEDULE B if you or your spouse is a director, officer, owner, partner, member, or trustee of a business OR if you or your spouse (either individually or collectively) owns an interest in a business which exceeds 10%.**

*** "Business" means any corporation, partnership, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.**

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Schedule C: Positions - Nonprofit

☐ Check if not applicable

☒ Filer ☐ Spouse

Name of Organization: Southern Regional Education Board

Address: 592 10th Street N.W.

City, State, Zip: Atlanta, GA 30318-5776

Nature of Association: Member

Description of Organization: Non-profit, non-partisan organization

☐ Filer ☒ Spouse

Name of Organization: Supriya Jindal Foundation for LA Children

Address: P.O. Box 86955

City, State, Zip: Baton Rouge, LA 70879

Nature of Association: President

Description of Organization: Non-profit charitable organization

☐ Filer ☒ Spouse

Name of Organization: Parenting Magazine Mom's Congress

Address: 2 Park Avenue, 10th Floor

City, State, Zip: New York, NY 10016

Nature of Association: Advisory Board Member

Description of Organization: Specialty magazine

***You are required to complete SCHEDULE C if you or your spouse is a director or officer of a nonprofit agency.**

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Schedule C: Positions - Nonprofit

☐ Check if not applicable

☐ Filer ☒ Spouse

Name of Organization: Tulane University

Address: 1555 Poydras Street, Suite 1000

City, State, Zip: New Orleans, LA 70112

Nature of Association: President's Council Member

Description of Organization: University

☐ Filer ☒ Spouse

Name of Organization: The Governor's Mansion Foundation

Address: 117 Oakwood Drive

City, State, Zip: Franklin, LA 70538

Nature of Association: Executive Board Member

Description of Organization: Non-profit charitable organization

☒ Filer ☐ Spouse

Name of Organization: Louisiana Southern Growth Policies Board

Address: P.O. Box 12293

City, State, Zip: Research Triangle Park, NC 27709

Nature of Association: Trustee

Description of Organization: Non-partisan public policy organization

***You are required to complete SCHEDULE C if you or your spouse is a director or officer of a nonprofit agency.**

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Schedule C: Positions - Nonprofit

☐ Check if not applicable

☒ Filer ☐ Spouse

Name of Organization: Republican Governors Association

Address: 1747 Pennsylvania Ave NW, Suite 250

City, State, Zip: Washington, D.C. 20006

Nature of Association: Board Member and Gala Chairman

Description of Organization: Non-profit organization

☐ Filer ☒ Spouse

Name of Organization: Special Olympics Gold Medal Commission

Address: 1000 East Morris Avenue

City, State, Zip: Hammond, LA 70403

Nature of Association: Board Member

Description of Organization: Non-profit organization

☐ Filer ☐ Spouse

Name of Organization:

Address:

City, State, Zip:

Nature of Association:

Description of Organization:

***You are required to complete SCHEDULE C if you or your spouse is a director or officer of a nonprofit agency.**

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Schedule D: Income from the State, Political Subdivisions,and/or Gaming Interests

☐ Check if not applicable

☒ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)

Type of Income: ☒ State ☐ Political Subdivision ☐ Gaming Interest

Name of Business (if applicable): ______

Name of Income Source: State of Louisiana

Address: 1001 Capitol Access Road

City, State, Zip: Baton Rouge, LA 70802

Amount of Income (exact dollar amount): $ 127,407.48

☐ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)

Type of Income: ☐ State ☐ Political Subdivision ☐ Gaming Interest

Name of Business (if applicable): ______

Name of Income Source: ______

Address: ______

City, State, Zip: ______

Amount of Income (exact dollar amount): $ ______

☐ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)

Type of Income: ☐ State ☐ Political Subdivision ☐ Gaming Interest

Name of Business (if applicable): ______

Name of Income Source: ______

Address: ______

City, State, Zip: ______

Amount of Income (exact dollar amount): $ ______

*** You are required to complete SCHEDULE D if you or your spouse received income from the State, any political subdivision, and/or a gaming interest OR if a business in which you or your spouse owns an interest which exceeds 10% (either individually or collectively) received income from the aforementioned sources.**
*** The definitions for (and examples of) *political subdivision, gaming interest, and business* are found in the *Instructions Section* of this form.**
***"Income" (for a business) means gross income less costs of goods sold, and operating expenses.**
*** "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.**

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Schedule E: Income

☐ Check if not applicable

(income that exceeds $1,000 from each source)

☒ Filer ☐ Spouse

Name of Source of Income: Fidelity Spartan 500 Index Mutual Fund

Address: P.O. Box 770001

City, State, Zip: Cincinnati, OH 45277-0003

Nature of Services Rendered:

Type of Income: Dividends

Amount of Income: ☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ Filer ☐ Spouse

Name of Source of Income: Fidelity Growth Company

Address: P.O. Box 770001

City, State, Zip: Cincinnati, OH 45277-0003

Nature of Services Rendered:

Type of Income: Long-term Capital Gains

Amount of Income: ☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☒ Spouse

Name of Source of Income: Thornburg Investment Income Builder

Address: 2300 North Ridgetop Road

City, State, Zip: Santa Fe, NM 87506

Nature of Services Rendered:

Type of Income: Dividends

Amount of Income: ☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE E if you or your spouse received income in excess of $1,000 from each source of income.**
***"Income" (for a business) means gross income less costs of goods sold, and operating expenses.**
*** "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.**
***You are not required to disclose income derived from disability payments from any source; or child support or alimony payments contained in a court order.**
*** Income reported on Schedule D does not have to be restated on SCHEDULE E.**
*** If the income is derived from professional or consulting services and the disclosure of the source's name or address is prohibited by law or professional code, such income should be disclosed on SCHEDULE F.**

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Schedule E: Income

☐ Check if not applicable

(income that exceeds $1,000 from each source)

☐ Filer ☒ Spouse

Name of Source of Income: BlackRock U.S. Opportunities

Address: 1800 Merrill Lynch Drive

City, State, Zip: Pennington, NJ 08534

Nature of Services Rendered:

Type of Income: Capital Gains

Amount of Income: ☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999) ☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ Filer ☐ Spouse

Name of Source of Income: BlackRock Basic Value

Address: 1800 Merrill Lynch Drive

City, State, Zip: Pennington, NJ 08534

Nature of Services Rendered:

Type of Income: Dividends

Amount of Income: ☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999) ☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ Filer ☐ Spouse

Name of Source of Income: BlackRock Global Allocation

Address: 1800 Merrill Lynch Drive

City, State, Zip: Pennington, NJ 08534

Nature of Services Rendered:

Type of Income: Dividends

Amount of Income: ☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999) ☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE E if you or your spouse received income in excess of $1,000 from each source of income.**
***"Income" (for a business) means gross income less costs of goods sold, and operating expenses.**
*** "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.**
***You are not required to disclose income derived from disability payments from any source; or child support or alimony payments contained in a court order.**
*** Income reported on Schedule D does not have to be restated on SCHEDULE E.**
*** If the income is derived from professional or consulting services and the disclosure of the source's name or address is prohibited by law or professional code, such income should be disclosed on SCHEDULE F.**

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Schedule E: Income

☐ Check if not applicable

(income that exceeds $1,000 from each source)

☒ Filer ☐ Spouse

Name of Source of Income: BlackRock Global Allocation

Address: 1800 Merrill Lynch Drive

City, State, Zip: Pennington, NJ 08534

Nature of Services Rendered:

Type of Income: Long-term Capital Gains

Amount of Income: ☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ Filer ☐ Spouse

Name of Source of Income: BlackRock S&P 500 Index

Address: 1800 Merrill Lynch Drive

City, State, Zip: Pennington, NJ 08534

Nature of Services Rendered:

Type of Income: Dividends

Amount of Income: ☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ Filer ☐ Spouse

Name of Source of Income: BlackRock Latin America

Address: 1800 Merrill Lynch Drive

City, State, Zip: Pennington, NJ 08534

Nature of Services Rendered:

Type of Income: Long-term Capital Gains

Amount of Income: ☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE E if you or your spouse received income in excess of $1,000 from each source of income.**
***"Income" (for a business) means gross income less costs of goods sold, and operating expenses.**
*** "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.**
***You are not required to disclose income derived from disability payments from any source; or child support or alimony payments contained in a court order.**
*** Income reported on Schedule D does not have to be restated on SCHEDULE E.**
*** If the income is derived from professional or consulting services and the disclosure of the source's name or address is prohibited by law or professional code, such income should be disclosed on SCHEDULE F.**

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Schedule E: Income

☐ Check if not applicable

(income that exceeds $1,000 from each source)

☐ Filer ☒ Spouse

Name of Source of Income: Capital One Bank

Address: P.O. Box 85177

City, State, Zip: Richmond, VA 23285

Nature of Services Rendered:

Type of Income: Interest

Amount of Income: ☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ Filer ☐ Spouse

Name of Source of Income: Capital One Bank

Address: P.O. Box 85177

City, State, Zip: Richmond, VA 23285

Nature of Services Rendered:

Type of Income: Interest

Amount of Income: ☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☐ Spouse

Name of Source of Income:

Address:

City, State, Zip:

Nature of Services Rendered:

Type of Income:

Amount of Income: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE E if you or your spouse received income in excess of $1,000 from each source of income.**
***"Income" (for a business) means gross income less costs of goods sold, and operating expenses.**
*** "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.**
***You are not required to disclose income derived from disability payments from any source; or child support or alimony payments contained in a court order.**
*** Income reported on Schedule D does not have to be restated on SCHEDULE E.**
*** If the income is derived from professional or consulting services and the disclosure of the source's name or address is prohibited by law or professional code, such income should be disclosed on SCHEDULE F.**

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Schedule F: Income from Certain Professional or Consulting Services

☒ CHECK if no income was received from professional or consulting services (including mental health, medical health, or legal services) when the disclosure of the name or address of the source of income would be prohibited by law or by a professional code.

	INDUSTRY TYPE	# OF CLIENTS	AMOUNT OF INCOME BY CATEGORY	INCOME RECIPIENT
UTILITIES	Electric		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Gas		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Telephone		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Water		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Cable Television Companies		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both

	INDUSTRY TYPE	# OF CLIENTS	AMOUNT OF INCOME BY CATEGORY	INCOME RECIPIENT
TRANSPORTATION	Intrastate Companies		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Pipeline Companies		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Oil & Gas Exploration		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Oil & Gas Production		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Oil & Gas Retailers		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both

	INDUSTRY TYPE	# OF CLIENTS	AMOUNT OF INCOME BY CATEGORY	INCOME RECIPIENT
FINANCE & INSURANCE	Banks		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Savings & Loan Assoc.		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Loan and/or Finance		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Manufacturing Firms		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Mining Companies		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Life Insurance Companies		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Casualty Insurance Comp.		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both
	Other Insurance Companies		☐ I ☐ II ☐ III ☐ IV ☐ V ☐ VI	☐ Filer ☐ Spouse ☐ Both

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Schedule F: Income from Certain Professional or Consulting Services

(CONTINUED)

RETAIL COMPANIES	INDUSTRY TYPE	# OF CLIENTS	AMOUNT OF INCOME BY CATEGORY	INCOME RECIPIENT
	Beer Companies		☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
	Wine Companies		☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
	Liquor Companies		☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
	Beverage Distributors		☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both

ASSOCIATIONS	INDUSTRY TYPE	# OF CLIENTS	AMOUNT OF INCOME BY CATEGORY	INCOME RECIPIENT
	Trade		☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
	Professional		☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both

OTHER	INDUSTRY TYPE	# OF CLIENTS	AMOUNT OF INCOME BY CATEGORY	INCOME RECIPIENT
			☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
			☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
			☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
			☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
			☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
			☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
			☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both
			☐I ☐II ☐III ☐IV ☐V ☐VI	☐Filer ☐Spouse ☐Both

*** You are required to complete SCHEDULE F if you or your spouse received income from a professional or consulting service (including mental health, medical health, or legal services) when the disclosure of the name or address of the source of income would be prohibited by law or by a professional code.**
***"Income" (for a business) means gross income less costs of goods sold, and operating expenses.**
*** "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.**

Category Ranges:

Category I (less than $5,000) **Category II** ($5,000-$24,999) **Category III** ($25,000-$49,999)
Category IV ($50,000-$99,999) **Category V** ($100,000-$199,999) **Category VI** ($200,000 or more)

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Schedule G: Immovable Property

(a property that exceeds $2,000 in value)

☒ Check if not applicable

Location of Property: ☐ Filer ☐ Spouse ☐ Both

Country: ______ State: ______ Parish/County: ______

Address: ______

Description of Property:

______

Fair Market or Use Value by Category:

☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)

☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

Location of Property: ☐ Filer ☐ Spouse ☐ Both

Country: ______ State: ______ Parish/County: ______

Address: ______

Description of Property:

______

Fair Market or Use Value by Category:

☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)

☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

Location of Property: ☐ Filer ☐ Spouse ☐ Both

Country: ______ State: ______ Parish/County: ______

Address: ______

Description of Property:

______

Fair Market or Use Value by Category:

☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)

☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to disclose the location by country, state, and parish/county.**
*** Fair market value and use value are determined by the assessor for purposes of ad valorem taxes.**

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Schedule H: Investment Holdings

(a holding that exceeds $1,000 in value)

☒ Check if not applicable

☐ Filer ☐ Spouse ☐ Both

Name of Security:

Description of Security:

Value by category: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☐ Spouse ☐ Both

Name of Security:

Description of Security:

Value by category: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☐ Spouse ☐ Both

Name of Security:

Description of Security:

Value by category: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE H if you or your spouse holds investment securities that have a value that exceeds $1,000 each.**
*** You are not required to disclose variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, and cash/cash equivalent investments.**
*** You are not required to disclose information concerning any property held and administered for any person other than you or your spouse under a trust, tutorship, curatorship, or other custodial instrument.**

LOUISIANA BOARD OF ETHICS
Post Office Box 4368
Baton Rouge, Louisiana 70821

Schedule I: Transactions

☐ Check if not applicable

(a transaction that exceeds $1,000)

☐ **Filer** ☐ **Spouse** ☒ **Both**

Transaction Date: Apr 6, 2011

Description of Transaction:

Buy - Fidelity Spartan 500 Index Mutual Fund

Amount of Transaction:

☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ **Filer** ☐ **Spouse** ☒ **Both**

Transaction Date: Jul 8, 2011

Description of Transaction:

Buy - Fidelity Spartan 500 Index Mutual Fund

Amount of Transaction:

☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ **Filer** ☐ **Spouse** ☒ **Both**

Transaction Date: Oct 7, 2011

Description of Transaction:

Buy - Fidelity Spartan 500 Index Mutual Fund

Amount of Transaction:

☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures THAT EXCEED $1,000 EACH, including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures.**
*** You are not required to report information concerning variable annuities, variable life insurance, or variable universal life insurance.**

LOUISIANA BOARD OF ETHICS
Post Office Box 4368
Baton Rouge, Louisiana 70821

Schedule I: Transactions

☐ Check if not applicable

(a transaction that exceeds $1,000)

☐ **Filer** ☐ **Spouse** ☒ **Both**

Transaction Date: Dec 16, 2011

Description of Transaction:

Buy - Fidelity Spartan 500 Index Mutual Fund

Amount of Transaction:

☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ **Filer** ☐ **Spouse** ☒ **Both**

Transaction Date: Dec 16, 2011

Description of Transaction:

Buy - Fidelity Growth Company Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date: Apr 1, 2011

Description of Transaction:

Buy - FMI Large Cap Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures THAT EXCEED $1,000 EACH, including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures.**
*** You are not required to report information concerning variable annuities, variable life insurance, or variable universal life insurance.**

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Baton Rouge, Louisiana 70821

Schedule I: Transactions

☐ Check if not applicable

(a transaction that exceeds $1,000)

☒ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date: Apr 13, 2011

Description of Transaction:

Buy - Fidelity Contrafund Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date: Oct 31, 2011

Description of Transaction:

Sell - Legg Mason Value Trust Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date: Oct 31, 2011

Description of Transaction:

Sell - Legg Mason Opportunity Trust Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures THAT EXCEED $1,000 EACH, including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures.**
*** You are not required to report information concerning variable annuities, variable life insurance, or variable universal life insurance.**

LOUISIANA BOARD OF ETHICS
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Schedule I: Transactions

☐ Check if not applicable

(a transaction that exceeds $1,000)

☒ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date: Oct 31, 2011

Description of Transaction:

Sell - Legg Mason Special Investment Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date: Dec 5, 2011

Description of Transaction:

Sell - Royce Pennsylvania Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date: Dec 5, 2011

Description of Transaction:

Sell - Thornburg Investment Income Builder Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures THAT EXCEED $1,000 EACH, including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures.**
*** You are not required to report information concerning variable annuities, variable life insurance, or variable universal life insurance.**

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Schedule I: Transactions

☐ Check if not applicable

(a transaction that exceeds $1,000)

☐Filer ☒Spouse ☐Both

Transaction Date: Dec 13, 2011

Description of Transaction:

Buy - BlackRock U.S. Opportunities Mutual Fund

Amount of Transaction:

☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)

☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐Filer ☐Spouse ☒Both

Transaction Date: Apr 8, 2011

Description of Transaction:

Buy - Louisiana START Fund for Selia Jindal

Amount of Transaction:

☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)

☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐Filer ☐Spouse ☒Both

Transaction Date: Apr 8, 2011

Description of Transaction:

Buy - Louisiana START Fund for Shaan Jindal

Amount of Transaction:

☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)

☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures THAT EXCEED $1,000 EACH, including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures.**

*** You are not required to report information concerning variable annuities, variable life insurance, or variable universal life insurance.**

LOUISIANA BOARD OF ETHICS
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Baton Rouge, Louisiana 70821

Schedule I: Transactions

☐ Check if not applicable

(a transaction that exceeds $1,000)

☐ **Filer** ☐ **Spouse** ☒ **Both**

Transaction Date: Apr 8, 2011

Description of Transaction:

Buy - Louisiana START Fund for Slade Jindal

Amount of Transaction:

☒ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ **Filer** ☒ **Spouse** ☐ **Both**

Transaction Date: Oct 31, 2011

Description of Transaction:

Sell - Legg Mason Opportunity Trust Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ **Filer** ☒ **Spouse** ☐ **Both**

Transaction Date: Oct 31, 2011

Description of Transaction:

Sell - Legg Mason Special Investment Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures THAT EXCEED $1,000 EACH, including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures.**
*** You are not required to report information concerning variable annuities, variable life insurance, or variable universal life insurance.**

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Schedule I: Transactions

☐ Check if not applicable

(a transaction that exceeds $1,000)

☐ **Filer** ☒ **Spouse** ☐ **Both**

Transaction Date: Oct 31, 2011

Description of Transaction:

Sell - Legg Mason Value Trust Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ **Filer** ☒ **Spouse** ☐ **Both**

Transaction Date: Dec 5, 2011

Description of Transaction:

Sell - Royce Pennsylvania Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ **Filer** ☒ **Spouse** ☐ **Both**

Transaction Date: Dec 5, 2011

Description of Transaction:

Sell - Thornburg Investment Income Builder Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures THAT EXCEED $1,000 EACH, including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures.**
*** You are not required to report information concerning variable annuities, variable life insurance, or variable universal life insurance.**

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Schedule I: Transactions

☐ Check if not applicable

(a transaction that exceeds $1,000)

☒ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date: Jan 28, 2011

Description of Transaction:

Sell - BlackRock Pacific Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☒ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date: Jan 28, 2011

Description of Transaction:

Sell - BlackRock Latin America Mutual Fund

Amount of Transaction:

☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ **Filer** ☐ **Spouse** ☐ **Both**

Transaction Date:

Description of Transaction:

Amount of Transaction:

☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures THAT EXCEED $1,000 EACH, including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures.**
*** You are not required to report information concerning variable annuities, variable life insurance, or variable universal life insurance.**

LOUISIANA BOARD OF ETHICS
Post Office Box 4368
Baton Rouge, Louisiana 70821

Schedule J: Liabilities

☒ Check if not applicable

(a liability that exceeds $10,000)

☐ Filer ☐ Spouse

Name of Creditor: ______

Address: ______

City, State, Zip: ______

Name of Guarantor (if applicable): ______

Nature of Liability: ______

Amount of liability: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☐ Spouse

Name of Creditor: ______

Address: ______

City, State, Zip: ______

Name of Guarantor (if applicable): ______

Nature of Liability: ______

Amount of liability: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☐ Spouse

Name of Creditor: ______

Address: ______

City, State, Zip: ______

Name of Guarantor (if applicable): ______

Nature of Liability: ______

Amount of liability: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE J if you or your spouse (either individually or collectively) owes a liability that exceeds $10,000 each.**
*** You are not required to disclose any loan secured by movable property, if such loan does not exceed the purchase price of the movable property which secures the loan.**
*** You are not required to disclose any liability, secured or unsecured, which is guaranteed by you or your spouse for a business in which you or your spouse owns any interest, provided that the liability is in the name of the business and, if the liability is a loan, that you or your spouse does not use proceeds from the loan for personal use unrelated to business.**
*** You are not required to disclose any loan from an immediate family member, unless such family member is a registered lobbyist, or his principal or employer is a registered lobbyist, or he employs or is a principal of a registered lobbyist, or unless such family member has a contract with the State.**

LOUISIANA BOARD OF ETHICS
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Schedule K: Other Offices/Positions Held

☒ Check if not applicable **(positions that would require the filing of a Tier 2, Tier 2.1, or Tier 3 personal financial disclosure statement)**

Name of Office/Position: ______
Name of Office/Position: ______
Name of Office/Position: ______
Name of Office/Position: ______
Name of Office/Position: ______
Name of Office/Position: ______
Name of Office/Position: ______
Name of Office/Position: ______
Name of Office/Position: ______
Name of Office/Position: ______

*** You are required to complete SCHEDULE K if you hold any other office or position which would require you to file a personal financial disclosure statement under La. R.S. 42:1124.2, 42:1124.2.1, or 42:1124.3.**

LOUISIANA BOARD OF ETHICS
Post Office Box 4368
Baton Rouge, Louisiana 70821

Schedule L: Contributions

☒ Check if not applicable **(made within one year of employment- in excess of $1,000)**

Date of Employment: ______________ Salary: $ ____________________

Candidate Name: ____________________________________

Amount of Contribution or Loan: $ __________________

Date of Employment: ______________ Salary: $ ____________________

Candidate Name: ____________________________________

Amount of Contribution or Loan: $ __________________

Date of Employment: ______________ Salary: $ ____________________

Candidate Name: ____________________________________

Amount of Contribution or Loan: $ __________________

Date of Employment: ______________ Salary: $ ____________________

Candidate Name: ____________________________________

Amount of Contribution or Loan: $ __________________

Date of Employment: ______________ Salary: $ ____________________

Candidate Name: ____________________________________

Amount of Contribution or Loan: $ __________________

*** You are required to complete SCHEDULE L if you are directly employed by a *statewide elected official* to serve as an agency head AND you made a contribution in excess of $1,000 to the campaign of the official who employed you.**
*** You are only required to disclose contributions or loans made within one year of employment or appointment.**
*** "Candidate" means a person who seeks nomination or election to public office, except the office of president or vice president of the United States, presidential elector, delegate to a political party convention, United States senator, United States congressman, or political party office.**
*** "Contribution" means a gift, conveyance, payment, or deposit of money or anything of value, or the forgiveness of a loan or of a debt, made for the purpose of supporting, opposing, or otherwise influencing the nomination or election of a person to public office, whether made before or after the election.**
*** "Loan" means a transfer of money, property, or anything of value in exchange for obligation to repay in whole or in part, made for the purpose of supporting, opposing, or otherwise influencing the nomination for election, or election, of any person to public office.**