

**Statement of Economic Interests**  
 Filed in 2016 for calendar year 2015 by

*emailed*  
 4-28-16

**Loudenbeck, Amy**

Legislature  
 Assembly District 31

APR 29 2016

FOR EXPLANATIONS, EXAMPLES AND EXCEPTIONS SEE THE INSTRUCTIONS OR VISIT OUR WEBSITE AT <http://ethics.state.wi.us>.  
 Still have questions? For priority service send an e-mail to: [GABethics@wi.gov](mailto:GABethics@wi.gov); otherwise leave a detailed message at (608) 261-2028.  
 ATTACH ADDITIONAL PAGES AS NEEDED/PLEASE SEE INSTRUCTIONS

**Part A As of December 31, 2015**

**1. INVESTMENTS**

**a) WISCONSIN DEFERRED COMPENSATION PROGRAM** If you held an investment in a fund available within the Wisconsin Deferred Compensation Program, please place a checkmark next to each fund in which you held \$5,000 or more, whether held privately or through the Program.

*A*

Profile Series	\$5,000 to \$50,000	More than \$50,000	Small Cap	\$5,000 to \$50,000	More than \$50,000	Bond	\$5,000 to \$50,000	More than \$50,000
Vanguard Retirement 2055	<input type="checkbox"/>	<input type="checkbox"/>	BlackRock Russell 2000 Index	<input type="checkbox"/>	<input type="checkbox"/>	BlackRock US Debt Index	<input type="checkbox"/>	<input type="checkbox"/>
Vanguard Retirement 2045	<input type="checkbox"/>	<input type="checkbox"/>	DFA US Micro Cap	<input type="checkbox"/>	<input type="checkbox"/>	Federated US Government Securities 2-5yr	<input type="checkbox"/>	<input type="checkbox"/>
Vanguard Retirement 2035	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Mid Cap</b>			Vanguard Long-term Investment Grade Adm	<input type="checkbox"/>	<input type="checkbox"/>
Vanguard Retirement 2025	<input type="checkbox"/>	<input type="checkbox"/>	BlackRock Mid Cap Equity Index	<input type="checkbox"/>	<input type="checkbox"/>			
Vanguard Retirement 2015	<input type="checkbox"/>	<input type="checkbox"/>	T Rowe Price Mid Cap Growth	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Money Market</b>		
Vanguard Target Retirement Income	<input type="checkbox"/>	<input type="checkbox"/>	<b>Large Cap</b>			Vanguard Admiral Treasury Money Market	<input type="checkbox"/>	<input type="checkbox"/>
			Calvert Social Investment Equity	<input type="checkbox"/>	<input type="checkbox"/>	<b>Fixed</b>		
			Fidelity Contrafund	<input type="checkbox"/>	<input type="checkbox"/>	Stable Value	<input type="checkbox"/>	<input type="checkbox"/>
<b>International</b>			Vanguard Institutional Index Plus	<input checked="" type="checkbox"/>	<input type="checkbox"/>	FDIC Bank Option	<input type="checkbox"/>	<input type="checkbox"/>
American Euro Pacific Growth	<input type="checkbox"/>	<input type="checkbox"/>	Vanguard Wellington-Admiral Shares	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
BlackRock EAFE Equity Index	<input type="checkbox"/>	<input type="checkbox"/>						

**b) OTHER INVESTMENTS** List stocks, bonds, limited partnerships, Wisconsin governmental securities, and mutual and money market funds in which you and your family's interest was valued at \$5,000 or more.

MUTUAL OR MONEY MARKET FUND	(check one)	\$5,000 to \$50,000	More than \$50,000
<input checked="" type="checkbox"/> Dodge & Cox Balanced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Europacific Growth	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> iShares Russell Mid Cap	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Sentinel Small Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> SPDR S&P ETF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> T Rowe Price Equity Income	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Vanguard Wellington Fund	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STOCKS/OPTIONS/FUTURES	(check one)	\$5,000 to \$50,000	More than \$50,000
<input checked="" type="checkbox"/> Apple Inc	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> AT&T	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> EMC Corp Mass	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<input checked="" type="checkbox"/>	Gilean Science Inc	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Johnson & Johnson	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Kinder Morgan Inc	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<del>NPS Pharmaceutical</del>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Toyota Motor Corp	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VALERO ENERGY CORP.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>

<b>BONDS</b>		(check one)	\$5,000 to \$50,000	More than \$50,000
<input checked="" type="checkbox"/>	Bank Amer Corp Internotes Semi Survivor Option	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Goldman Sachs Group Inc Medium Term Note	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Goldman Sachs Group Inc Medium Term Note Monthly Survivor Option	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Merrill Lynch & Co Medium Term Note	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>LIMITED PARTNERSHIPS</b>		(check one)	\$5,000 to \$50,000	More than \$50,000
<input checked="" type="checkbox"/>	<del>Enterprise Products Partners LTD Partnership</del>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>WISCONSIN GOVERNMENTAL SECURITIES</b>		(check one)	\$5,000 to \$50,000	More than \$50,000
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**2. BUSINESS ACTIVITIES** List businesses, farms, rental, commercial, and income-producing real estate; and business activities in which you or your family had at least a 10% or greater interest.

a) Enterprise(s) operating under a business or trade name, list here.

Name of business	Municipality or Town	County	State	Describe nature of business
<input checked="" type="checkbox"/> Huckleberry Park LLC	Winona	Shannon	MO	Rental Property
<input checked="" type="checkbox"/> Lucky Farms	Clinton	Rock	WI	<del>Hobby Farm &amp; Consulting</del> Agriculture

b) Enterprise(s) NOT operating under a business or trade name, list here.

Name of business	Municipality or Town	County	State	Describe nature of business

**3. COMMERCIAL CUSTOMERS, CLIENTS, AND TENANTS** For each unincorporated business, subchapter S corporation, service corporation (SC), limited liability company (LLC), partnership, or income-producing real estate reported in Item 2, from which the filer or a member of the filer's immediate family received \$10,000 or more in 2015, list businesses, organizations, and lobbyists that paid the enterprise \$10,000 or more in calendar year 2015.

Check if the organization authorized you to represent it in its dealings with others as an attorney-at-law, agent, spokesperson, or representative.

Businesses, organizations, lobbyists that were customers, clients, or tenants	City	State	"✓"
<input checked="" type="checkbox"/> Farm City Elevator Inc	Darien	WI	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

✓ **4. BUSINESS PARTNERS** For each enterprise reported under Item 2, list its co-owners, partners, officers, and directors (other than yourself), unless the information is already registered with the Wisconsin Department of Financial Institutions.

Business	Partners, or officers and directors	City	State
✓ Huckleberry Park LLC	Matthew Loudenbeck	Clinton	WI
<del>Barely Farms</del>	<del>Matthew Loudenbeck</del>	<del>Clinton</del>	<del>WI</del>

✓ **5. NON-COMMERCIAL REAL ESTATE** List the specific location of WISCONSIN REAL ESTATE in which you or your family had an interest (except your principal residence and real estate whose location you already listed in item 2).

Location of property Street address or fire number	Municipality or town	County	Nature of interest (e.g. own, lease, option, easement, land contract)
✓ 8750 Indian Lake Rd	Woodboro	Oneida	own
✓ Resort Ro 533/T38N/R7E	Lake Tomahawk	Oneida	own

✓ **6. OFFICERS AND DIRECTORS** List organizations of which you or a family member was an officer or director (unless already listed in item 2).

Business or organization	City	State	Position
✓ IAFF Local 1569 (Belfidere Professional Firefighters Assoc.)	Belvidere	IL	Vice President
✓ International Miniature Zebu Association	Crawford	NE	Director
✓ Stateline World Trade Association	Beloit	WI	Ex-Officio Director

✓ Clinton Fencehoppers Snowmobile Club Clinton WI Director  
 ✓ Belvidere Fire 20th Foreign Tax Fund Belvidere IL Chairman

✓ **7. AGENT, REPRESENTATIVE OR SPOKESPERSON** List organizations that authorized you or a family member to represent them in their dealings with others as an attorney-at-law, agent, spokesperson, or representative (unless already listed in item 2, 3 or 6).

Business or organization	City	State

✓ **8. CREDITORS** List creditors to which you or your family owed \$5,000 or more. (check one)

Creditor	City	State	\$5,000 to \$50,000	More than \$50,000
✓ Parker Community Credit Union	Janesville	WI	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<del>Security Bank Ozarks</del>	<del>Winona</del>	<del>MI</del>	<del><input type="checkbox"/></del>	<del><input type="checkbox"/></del>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

**Part B For calendar year 2015**

✓ **9. EMPLOYERS** List your and your family's EMPLOYERS (\$1,000 or more of income) in 2015.

Name of employer (if State of Wisconsin, also identify agency or institution)	City	State	Nature of employer's business
✓ City of Belvidere Fire Department	Belvidere	IL	Municipal Fire Department
✓ Wisconsin Legislature	Madison	WI	Assembly member

**10. ADDITIONAL SOURCES OF INCOME** List other sources from which you or your family received income of \$1,000 or more in 2015.

Source of income	City	State

**11. ENTERTAINMENT AND GIFTS** List individuals and organizations that provided you with entertainment or gifts (more than \$50) in 2015.

Name of provider	City	State

**12. HONORARIA AND EXPENSES** List, for 2015, sources of honoraria and payment of expenses related to your state government duties (more than \$50) not previously reported to the Government Accountability Board.


Payer	Approximate value of expenses	Amount of honorarium	Circumstances of receipt
✓ PEW CHARITABLE TRUST	\$1,250 <sup>00</sup>	X	TRAVEL + LODGING + MEALS FOR EVIDENCE BASED POLICY CONF.

**FILING NOTES -or- COMMENTS**

If we saw an opportunity to clarify a prior report, we added comments or filing tips below. Please review any comments and make the appropriate corrections.

**CERTIFICATION**

I have read the accompanying instructions and certify that the information contained in this Statement of Economic Interests is true, complete, and correct to the best of my knowledge, information, and belief. In the event this Statement of Economic Interests is filed prior to December 31st for an election in the following year, I certify that I will amend it on or before the statutory filing deadline if an amendment is necessary to bring it into conformity with the true statement of my economic interests as of December 31, 2015. If any part has been left blank, I have done so intentionally because there is nothing to report.

	Daytime phone # (608) 266-9967
4/28/16	Rep.Loudenbeck@legis.wisconsin.gov
Signature of person filing	E-mail address

The information sought in this form is required by §§19.43 and 19.44, *Wisconsin Statutes*. Failure to file a completed form may result in a forfeiture of up to \$500. Statements of Economic Interests are open for public inspection. The Government Accountability Board will notify you of the identity of any person who examines your Statement. In accordance with §15.04(1)(m), *Wisconsin Statutes*, the Government Accountability Board states that no personally identifiable information is likely to be used for purposes other than those for which it is collected.

Mail, email or fax to: Wisconsin Government Accountability Board, P.O. Box 7984, Madison, WI 53707-7984;  
Email: GABEthics@wi.gov; Fax: (608) 264-9319

**From:** Becker, Jonathan - GAB [<mailto:Jonathan.Becker@wisconsin.gov>]  
**Sent:** Wednesday, July 15, 2015 12:51 PM  
**To:** Zimmerman, Danielle <[Danielle.Zimmerman@legis.wisconsin.gov](mailto:Danielle.Zimmerman@legis.wisconsin.gov)>  
**Subject:** RE: Rep. Loudenbeck question regarding conferences/cost

The Ethics Code provides that a state official may accept [payment or reimbursement of expenses for attending a conference if it is on behalf of and for the benefit of the State. The conference appears to have a state government subject matter. While not required, we generally recommend that a legislator also seek leadership approval for the travel.

Jonathan Becker  
Administrator, Division of Ethics and Accountability  
Wisconsin Government Accountability Board  
[jonathan.becker@wi.gov](mailto:jonathan.becker@wi.gov)  
Phone: (608) 267-0647 Fax: (608) 264-9319

**From:** Zimmerman, Danielle [<mailto:Danielle.Zimmerman@legis.wisconsin.gov>]  
**Sent:** Tuesday, July 14, 2015 9:42 AM  
**To:** Becker, Jonathan - GAB  
**Subject:** Rep. Loudenbeck question regarding conferences/cost

Hello Jonathan-

I was told you could help me out with this question. Rep. Loudenbeck and her chief of staff were invited to attend a conference in Washington DC by The Pew Charitable Trusts. We wanted to double check and see what was allowed under Wisconsin's laws because The Pew Charitable Trusts covers some of the costs. I've copied what they sent to me for you.

"To the extent permitted under applicable state and local gift and ethics rules, the Pew-MacArthur Results First Initiative will cover expenses for two nights' lodging at the W Hotel in DC and up to \$700 per person for air travel for conference participants (coach), and will provide meals during the conference."

I know they would both be required to fill out and have the travel forms approved, but I wanted to see if Pew Charitable Trusts could indeed cover the costs according to our ethics laws.

I hope that all makes sense, please feel free to call me if you have any questions or need additional information.

*Danielle Zimmerman*

Legislative Aide  
Office of Rep. Amy Loudenbeck | District #31 | 608-266-9967  
Room 306 East | State Capitol | P.O. Box 8952 | Madison, WI 53708

