

# Statement of Economic Interests

Filed in 2017 for calendar year 2016 by

**Miller, Mark**

Legislature

Senate District 16

FOR EXPLANATIONS, EXAMPLES AND EXCEPTIONS SEE THE INSTRUCTIONS OR VISIT OUR WEBSITE AT <http://ethics.wi.gov>.  
 Still have questions? For priority service send an e-mail to: [ethics@wi.gov](mailto:ethics@wi.gov); otherwise call (608) 266-8123.  
 ATTACH ADDITIONAL PAGES AS NEEDED/PLEASE SEE INSTRUCTIONS

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**Part A**

**As of December 31, 2016**

**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.

Profile Series	More than \$5,000		Small Cap	More than \$5,000		Bond	More than \$5,000	
	\$5,000 to \$50,000	\$50,000		\$5,000 to \$50,000	\$50,000		\$5,000 to \$50,000	\$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 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"/>	<b>Money Market</b>		
Vanguard Retirement 2015	<input type="checkbox"/>	<input type="checkbox"/>	T Rowe Price Mid Cap Growth	<input type="checkbox"/>	<input type="checkbox"/>	Vanguard Admiral Treasury Money Market	<input type="checkbox"/>	<input type="checkbox"/>
Vanguard Target Retirement Income	<input type="checkbox"/>	<input type="checkbox"/>	<b>Large Cap</b>			<b>Fixed</b>		
American Euro Pacific Growth	<input type="checkbox"/>	<input type="checkbox"/>	Calvert Social Investment Equity	<input type="checkbox"/>	<input type="checkbox"/>	Stable Value	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock EAFE Equity Index	<input type="checkbox"/>	<input type="checkbox"/>	Fidelity Contrafund	<input type="checkbox"/>	<input type="checkbox"/>	FDIC Bank Option	<input type="checkbox"/>	<input type="checkbox"/>
			Vanguard Institutional Index Plus	<input type="checkbox"/>	<input type="checkbox"/>			
			Vanguard Wellington-Admiral Shares	<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

American Funds	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Calvert Fund Group	<input checked="" 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 type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

**BONDS**

(check one) \$5,000 to \$50,000 More than \$50,000

	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

**LIMITED PARTNERSHIPS**

(check one) \$5,000 to \$50,000 More than \$50,000

	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

**WISCONSIN GOVERNMENTAL SECURITIES**

(check one) \$5,000 to \$50,000 More than \$50,000

**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
Big Mountain Enterprises	Monona	Dane	WI	Small business consultant

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
4901 Roigan Terrace	Monona	Dane	WI	rental house
<del>Jo Miller</del>	<del>Monona</del>	<del>Dane</del>	<del>WI</del>	<del>Shiatsu body works</del> <i>Bus. Consultant</i>

**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 2016, list businesses, organizations, and lobbyists that paid the enterprise \$10,000 or more in calendar year 2016.

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 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

**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)

**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
Aldo Leopold Nature Center	Monona	WI	Board Member
Democratic Leadership Campaign Committee	Washington	DC	Board Member
Madison-Obihiro Sister City, Inc.	Madison	WI	President
Wisconsin Education Approval Board	Madison	WI	Board Member
<del>Wisconsin Women In Business, Inc.</del>	<del>Madison</del>	<del>WI</del>	<del>Director</del>
Project Home Inc	Madison	WI	Director
City of Madison - Sister City Celebration Committee	Madison	WI	Director

**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
<del>Summit Credit Union</del>	<del>Madison</del>	<del>WI</del>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
UW Credit Union	Madison	WI	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<del>Capital Bank</del>			<input checked="" type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

**Part B** For calendar year 2016

**9. EMPLOYERS** List your and your family's EMPLOYERS (\$1,000 or more of income) in 2016.

Name of employer (if State of Wisconsin, also identify agency or institution)	City	State	Nature of employer's business
State of WI - Legislature	Madison	WI	State Government

**10. ADDITIONAL SOURCES OF INCOME** List other sources from which you or your family received income of \$1,000 or more in 2016.

Source of income	City	State
Military Retirement	San Antonio	TX
social security	Washington	DC

**11. ENTERTAINMENT AND GIFTS** List individuals and organizations that provided you with entertainment or gifts (more than \$50) in 2016.

Name of provider	City	State

**12. HONORARIA AND EXPENSES.** List, for 2016, sources of honoraria and payment of expenses related to your state government duties (more than \$50) not previously reported to the Wisconsin Ethics Commission.

Payer	Approximate value of expenses	Amount of honorarium	Circumstances of receipt
National Institute for Civil Discourse	\$825		Lodging, travel, and meals for training
National Caucus of Environmental Legislators	\$1227		Lodging and meals for conferences
Midwest Interstate Passenger Rail Commission	\$693		Lodging, travel, meals and entertainment

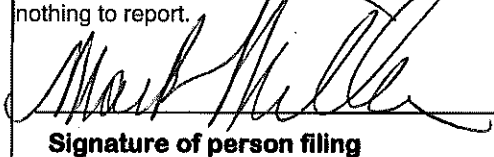
**FILING NOTES -or- COMMENTS**

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.

For Meeting

**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, 2016. If any part has been left blank, I have done so intentionally because there is nothing to report.



Signature of person filing

Daytime phone # (608) 266-9170

1/19/2017

Date

Sen.Miller@legis.wisconsin.gov

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 Wisconsin Ethics Commission will notify you of the identity of any person who examines your Statement. In accordance with §15.04(1)(m), *Wisconsin Statutes*, the Ethics Commission states that no personally identifiable information is likely to be used for purposes other than those for which it is collected.

Mall, email or fax to:

Wisconsin Ethics Commission, P.O. Box 7984, Madison, WI 53707-7984;

Email: Ethics@wi.gov; Fax: (608) 264-9319