<table>
<thead>
<tr>
<th>Date of Report</th>
<th>01/19/2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Candidate</td>
<td></td>
</tr>
<tr>
<td>Name of Political Committee</td>
<td></td>
</tr>
<tr>
<td>Number of Committee Contributions Received</td>
<td>0</td>
</tr>
<tr>
<td>Number of Committee Contributions Expenditures Incurred</td>
<td>0</td>
</tr>
<tr>
<td>Total Contributions Received</td>
<td>0</td>
</tr>
<tr>
<td>Total Expenditures Incurred</td>
<td>0</td>
</tr>
</tbody>
</table>

### Schedule A - Reporting Period

- **Beginning Date of Reporting Period:** 01/20/2009
- **Ending Date of Reporting Period:** 01/19/2009

### Schedule B - Reporting Period

- **Beginning Date of Reporting Period:** 01/20/2009
- **Ending Date of Reporting Period:** 01/19/2009

### Schedule C - Political Committee

- **Name of Political Committee:**
- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule D - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule E - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule G - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule H - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule I - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule J - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule K - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule L - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule M - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule N - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule O - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule P - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule Q - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule R - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule S - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule T - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule U - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule V - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule W - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule X - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule Y - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0

### Schedule Z - Political Committee

- **Number of Contributions Received:** 0
- **Number of Expenditures Incurred:** 0
- **Total Contributions Received:** 0
- **Total Expenditures Incurred:** 0
<table>
<thead>
<tr>
<th>Type</th>
<th>Amount</th>
<th>Block A</th>
<th>Block B</th>
<th>Income Type and Amount</th>
<th>Valuation of Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Block C (Use Only If Needed)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Note</th>
<th></th>
</tr>
</thead>
</table>

If the other higher categories of table apply, an appropriate note describing the type of dependent child is entered on the line with the appropriate child.
**Schedule B**

Do not complete Schedule B if you are a new entrant, nominee, Vice Presidential or Presidential Candidate.

### Part II: Gifts, Reimbursements, and Travel Expenses

For the following gifts, reimbursements, and travel expenses that you received:

- Gifts of value totaling $500 or more
- Reimbursements
- Travel expenses

**Exhibit A**

- Include gifts and gifts under $50 that are incident to business travel.
- Include gifts received in connection with official travel.
- Include any gifts received for a person other than the recipient of the gift.

**Exhibit B**

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A.

**Exhibit C**

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel.

**Exhibit D**

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel.

**Exhibit E**

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

**Exhibit F**

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were not reported on Exhibit A.

**Exhibit G**

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

**Exhibit H**

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

**Exhibit I**

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were not received in connection with official travel but were reported on Exhibit A.

- Include all gifts, reimbursements, and travel expenses that were not reported on Exhibit A and were received in connection with official travel but were not reported on Exhibit A.
Part II: Agreements or Arrangements

<table>
<thead>
<tr>
<th>Agreement/Arrangement</th>
<th>Recurring Charge Account - Paid in Full Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revolving charge account - paid in full monthly</td>
<td>2008</td>
</tr>
<tr>
<td>12.0%</td>
<td>1998</td>
</tr>
<tr>
<td>Recurring charge account - paid in full monthly</td>
<td>2007</td>
</tr>
<tr>
<td>17.9%</td>
<td>1997</td>
</tr>
</tbody>
</table>

Table continued...

Note: The table contains information about recurring charge accounts and their payment schedules. The table is part of a form, likely related to financial or legal agreements. The specific details within the table are not clearly visible due to the format and layout of the image.
### Part I: Positions Held Outside U.S. Government

<table>
<thead>
<tr>
<th>Office or Organization/Formerly Employed</th>
<th>Title Held</th>
<th>Date of Termination</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
</tbody>
</table>

**None**

### Part II: Combinations In Excess Of $5,000 Paid By One Source

<table>
<thead>
<tr>
<th>Source (Name and Address)</th>
<th>Position Held</th>
<th>Type of Organization</th>
<th>Position Held in Government</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
<tr>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
<td>[Information Redacted]</td>
</tr>
</tbody>
</table>

**None**
## ATTACHMENT 1
### Morningstar Aggressive Growth Taxable Portfolio

<table>
<thead>
<tr>
<th>Fund Name</th>
<th>Value</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aston/River Road Small-Mid Cap (ARSMX)</td>
<td>$1,664.01</td>
<td>EIF</td>
</tr>
<tr>
<td>Artisan Opportunistic Value Inv (ARTLX)</td>
<td>$3,971.73</td>
<td>EIF</td>
</tr>
<tr>
<td>Brandywine Blue (BLUEX)</td>
<td>$3,275.59</td>
<td>EIF</td>
</tr>
<tr>
<td>Cambiar Aggressive Value Investor (CAMAX)</td>
<td>$4,234.35</td>
<td>EIF</td>
</tr>
<tr>
<td>Cambiar Conquistador Inv (CAMSX)</td>
<td>$1,314.89</td>
<td>EIF</td>
</tr>
<tr>
<td>Champlain Mid Cap Adv (CIPMX)</td>
<td>$1,323.65</td>
<td>EIF</td>
</tr>
<tr>
<td>Champlain Small Company Adv (CIPSX)</td>
<td>$1,036.47</td>
<td>EIF</td>
</tr>
<tr>
<td>MainStay ICAP Select Equity I (ICSLX)</td>
<td>$4,872.93</td>
<td>EIF</td>
</tr>
<tr>
<td>Artisan International Value (ARTKX)</td>
<td>$2,234.07</td>
<td>EIF</td>
</tr>
<tr>
<td>Marisco Global (MGLBX)</td>
<td>$3,854.02</td>
<td>EIF</td>
</tr>
<tr>
<td>William Blair International Growth (WBIGX)</td>
<td>$1,602.82</td>
<td>EIF</td>
</tr>
<tr>
<td>ING Global Real Estate I (IGLIX)</td>
<td>$988.03</td>
<td>EIF</td>
</tr>
<tr>
<td>Nakoma Absolute Return (NARFX)</td>
<td>$1,640.01</td>
<td>EIF</td>
</tr>
<tr>
<td>Western Asset Inst Muni MM (INMXX)</td>
<td>$647.88</td>
<td>EIF</td>
</tr>
</tbody>
</table>

**Total:** $32,660.45
## ATTACHMENT 2

### Morningstar Absolute Return Portfolio

<table>
<thead>
<tr>
<th>Fund Name</th>
<th>Investment</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>T. Rowe Price Capital Appreciation (PRWCX)</td>
<td>$3,586.87</td>
<td>EIF</td>
</tr>
<tr>
<td>IVA Worldwide I (IVWIX)</td>
<td>$4,137.97</td>
<td>EIF</td>
</tr>
<tr>
<td>Aquila Three Peaks High Income I (ATIPX)</td>
<td>$2,141.97</td>
<td>EIF</td>
</tr>
<tr>
<td>FPA New Income (FPNIX)</td>
<td>$5,070.39</td>
<td>EIF</td>
</tr>
<tr>
<td>Arbitrage I (ARBNX)</td>
<td>$3,117.48</td>
<td>EIF</td>
</tr>
<tr>
<td>Absolute Strategies I (ASFIX)</td>
<td>$5,082.83</td>
<td>EIF</td>
</tr>
<tr>
<td>Calamos Convertible A (CCVIX)</td>
<td>$3,613.19</td>
<td>EIF</td>
</tr>
<tr>
<td>Calamos Market Neutral Income A (CVSIX)</td>
<td>$6,135.63</td>
<td>EIF</td>
</tr>
<tr>
<td>Diamond Hill Long-Short A (DIAMX)</td>
<td>$3,008.81</td>
<td>EIF</td>
</tr>
<tr>
<td>1st Source Monogram Long/Short (FMLSX)</td>
<td>$2,004.30</td>
<td>EIF</td>
</tr>
<tr>
<td>Gateway A (GATEX)</td>
<td>$6,120.40</td>
<td>EIF</td>
</tr>
<tr>
<td>Nakoma Absolute Return (NARFX)</td>
<td>$5,128.29</td>
<td>EIF</td>
</tr>
<tr>
<td>PIMCO Commodity Real Return Strat Admin (PCRRX)</td>
<td>$1,048.83</td>
<td>EIF</td>
</tr>
<tr>
<td>Vanguard Federal Money Market (VMFXX)</td>
<td>$1,013.14</td>
<td>EIF</td>
</tr>
</tbody>
</table>

**Total Investment:** $51,210.10
Attachment 3
Morningstar Multi Cap Growth Portfolio

<table>
<thead>
<tr>
<th>Fund Name</th>
<th>Amount</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baron Growth (BGRFX)</td>
<td>$2,240.72</td>
<td>EIF</td>
</tr>
<tr>
<td>Brandywine Blue (BLUEX)</td>
<td>$5,432.44</td>
<td>EIF</td>
</tr>
<tr>
<td>Champlain Mid Cap Adv (CIPMX)</td>
<td>$2,604.54</td>
<td>EIF</td>
</tr>
<tr>
<td>Champlain Small Company Adv (CIPSX)</td>
<td>$1,845.55</td>
<td>EIF</td>
</tr>
<tr>
<td>Calamos Growth A (CVGRX)</td>
<td>$5,076.29</td>
<td>EIF</td>
</tr>
<tr>
<td>Edgewood Growth Instl (EGFIX)</td>
<td>$5,097.77</td>
<td>EIF</td>
</tr>
<tr>
<td>Marisco Growth (MGRIX)</td>
<td>$6,797.21</td>
<td>EIF</td>
</tr>
<tr>
<td>T. Rowe Price Growth Stock Adv (TRSAX)</td>
<td>$5,429.91</td>
<td>EIF</td>
</tr>
<tr>
<td>Vanguard Federal Money Market (VMFXX)</td>
<td>$1,735.20</td>
<td>EIF</td>
</tr>
</tbody>
</table>

$36,259.63