SEEC SEATTLE ETHICS & ELECTIONS COMMISSION

File with: Seattle City Clerk
PO BOX 94728
Seattle, WA 98124-4728
Questions: (206) 684-8500
(206) 615-1248
polly.grow@seattle.gov

SEEC FORM **F-1** (3/16)

PERSONAL FINANCIAL AFFAIRS STATEMENT

SEEC DOLLAR CODE	AMOUNT		
(1)	$0	--	$999
(2)	$1,000	--	$4,999
(3)	$5,000	--	$9,999
(4)	$10,000	--	$24,999
(5)	$25,000	--	$99,999
(6)	$100,000	--	$199,999
(7)	$200,000	--	$999,999
(8)	$1,000,000	--	$4,999,999
(9)	$5,000,000 or more		

Deadlines: Incumbent elected and appointed officials -- by April 15. Candidates and others -- within two weeks of becoming a candidate or being newly appointed to a position.

SEND REPORT TO Seattle City Clerk

"Immediate family" means: (a) a spouse or domestic partner, or (b) a parent, parent of a spouse or domestic partner, child, child of spouse or domestic partner, sibling, uncle, aunt, cousin, niece or nephew, if that person either resides with or is a dependent on the Covered Individual's most recently filed federal income tax return. SMC 4.16.080

Last Name: BURGESS
First: TIMOTHY
Middle Initial: L

Mailing Address (Use PO Box or Work Address) *
P.O. BOX 34025

City: SEATTLE
County: KING
Zip + 4: 98124-4025

Names of immediate family members. If there is no reportable information to disclose for dependent children, or other dependents living in your household, do not identify them. Do identify your spouse or domestic partner.

SP JOLEEN E. BURGESS

FILED CITY OF SEATTLE
2016 APR 14 PM 4:
CITY CLERK

Filing Status (Check only one box.)

- ☒ An elected or appointed official filing annual report
- ☐ Final report as an elected official. Term expired: ______
- ☐ Candidate running in an election: month ______ year ______
- ☐ Newly appointed to an elective office

Office Held or Sought
Office title: CITY COUNCIL
Position number: 8
Term begins: JAN 2008 ends: DEC 2017

1 INCOME

List each employer, or other source of income (pension, social security, legal judgment, etc.) from which you or an immediate family member, received compensation, in any form, of $500 or more during the period. Include stock options received during the reporting period that had a value of more than $500.
(Report interest and dividends in Item 3.)

Show Self (S) Spouse (SP/DP) Dependent (D)	Name and Address of Employer or Source of Compensation	Occupation or How Compensation Was Earned	Amount: (Use Code)
	CITY OF SEATTLE	CITY COUNCIL	(6)
			( )
			( )
			( )

Check Here ☐ if continued on attached sheet

2 REAL ESTATE

List street address, assessor's parcel number, or legal description AND county for each parcel of Washington real estate with value of over $2,500 in which you or an immediate family member held a personal financial interest during the reporting period. (Show partnership, company, etc. real estate on F-1 supplement.)

Property Sold or Interest Divested	Assessed Value (Use Code)	Name and Address of Purchaser	Nature and Amount (Use Code) of Payment or Consideration Received
	( )		( )
	( )		( )

Property Purchased or Interest Acquired		Creditor's Name/Address	Payment Terms (eg. 20 yrs at 4.3%)	Security Given	Mortgage Amount - (Use Code) Original	Current
	( )				( )	( )
	( )				( )	( )
All Other Property Entirely or Partially Owned						
2110 BIGELOW AVE N, SEATTLE WA 98109 PARCEL #1689400480	(8)				(N/A)	(N)
	( )				( )	( )

Check here ☐ if continued on attached sheet

CONTINUE ON NEXT PAGE

3 ASSETS / INVESTMENTS - INTEREST / DIVIDENDS

List bank and savings accounts, insurance policies, stock, bonds and other intangible property (including but not limited to stock options) held during the reporting period.

	Type of Account or Description of Asset	Asset Value (Use Code)	Income Amount (Use Code)
A. Name and address of each bank or financial institution in which you or an immediate family member had an account over $5,000 at any time during the report period.			
JP MORGAN CHASE	CHECK/SAVINGS	(5)	(1)
B. Name and address of each insurance company where you or an immediate family member had a policy with a cash or loan value over $5,000 during the period.			
TRANSAMERICA LIFE COMPANIES, P.O. BOX 79035 CITY OF INDUSTRY, CA 91716	LIFE INSURANCE POLICIES	(1)	(1)
STATE FARM INDUSTRIES, P.O. BOX 53981 PHOENIX, AZ 85072	LIFE INSURANCE POLICIES	(1)	(1)
C. Name and address of each company, association, government agency, etc. in which you or an immediate family member, owned or had a financial interest worth over $500. Include stocks, bonds, ownership, retirement plan, IRA, notes, stock options, and other intangible property. If you or your immediate family member had decision making authority regarding individual assets/investments list each asset or investment, the value and any income amount. EXAMPLE: If you self-directed an investment account identify each stock or other asset in that account. **Stock shall be reported by market value at the time of reporting.**		( )	( )
		( )	( )
		( )	( )
		( )	( )
Check here ☐ if continued on attached sheet.			

4 CREDITORS

List each creditor you or an immediate family member owed $500 or more any time during the period. Don't include retail charge accounts, credit cards, or mortgages or real estate reported in Item 2.

Creditor's Name and Address	Terms of Payment (eg. 6 years at 5.25%)	Security Given	AMOUNT (USE CODE)	
			( )	( )
			( )	( )
Check here ☐ if continued on attached sheet.				

5 NET WORTH

Enter your estimated net worth.

Enter Dollar Amount

$ 5,150,000

6

All filers answer questions A thru D below. If the answer is YES to any of these questions, the F-1 Supplement must also be completed as part of this report. If all answers are NO and you are a candidate or an appointee to a vacant elective office filing your initial report, no F-1 Supplement is required.

Incumbent elected officials filing an annual financial affairs report also must answer question E. An F-1 Supplement is required of these officeholders unless all answers to questions A thru E are NO.

A. At any time during the reporting period were you and/or an immediate family member (1) an officer, director, general partner or trustee of any corporation, company, union, association, joint venture or other entity or (2) a partner or member of any limited partnership, limited liability partnership, limited liability company or similar entity including but not limited to a professional limited liability company? NO If yes, complete Supplement, Part A.

B. Did you and/or an immediate family member have an ownership of 10% or more in any company, corporation, partnership, joint venture or other business at any time during the reporting period? NO If yes, complete Supplement, Part A.

C. Did you and/or an immediate family member own a business at any time during the reporting period? NO If yes, complete Supplement, Part A.

D. Did you and/or an immediate family member prepare, promote or oppose state legislation, rules, rates or standards for compensation or deferred compensation (other than pay for a currently-held public office) at any time during the reporting period? NO If yes, complete Supplement, Part B.

E. **Only for Persons Filing Annual Report.** Regarding the receipt of items not provided or paid for by your governmental agency during the previous calendar year: 1) Did you, and/or an immediate family member accept a gift of food or beverages costing over $50 per occasion? NO or 2) Did any source other than your governmental agency provide or pay in whole or in part for you and/or an immediate family member to travel or to attend a seminar or other training? NO If yes to either or both questions, complete Supplement, Part C.

ALL FILERS EXCEPT CANDIDATES. Check the appropriate box.

☒ I hold a local elected office. I have read and am familiar with SMC 2.04.300 regarding the use of public facilities in campaigns.

Contact Telephone: (206) 684-8806 *

Email: tim.burgess@seattle.gov (work)*

Email: ____________ (Home) Optional

CERTIFICATION: I certify under penalty of perjury that the information contained in this report is true and correct to the best of my knowledge.

3/30/16

Date

Signature

*CANDIDATES: Do not use public agency addresses or telephone numbers for contact information.

Report Not Acceptable Without Filer's Signature

F-1

Information Continued

TIMOTHY BURGESS

3 ASSETS/INVESTMENTS - INTEREST / DIVIDENDS (continued)

C. Name and address of each company, association, government agency	Type of Account or Description of Asset	No. of Shares/Units	Asset Value (Use Code)	Income Amount (Use Code)
NW7687515				
Oppenheimer Developing Markets	Mutual Fund	2,600.471	(5)	(1)
MFS Value Fund Class I	Mutual Fund	3,929.351	(6)	(2)
Buffalo Discovery Fund	Mutual Fund	8,409.531	(6)	None
Wasatch Frontier Emerging Small	Mutual Fund	387.438	(1)	None
BBH Core Select Fund Class N	Mutual Fund	12,152.438	(7)	(2)
Templeton Global Bond Fund Class A	Mutual Fund	7,646.428	(5)	(2)
Vanguard Dividend Growth Fund	Mutual Fund	11,320.637	(7)	(2)
Vanguard Intermediate-Term	Mutual Fund	7,184.212	(6)	(2)
FMI Large Cap Fund	Mutual Fund	14,624.663	(7)	(2)
Dodge & Cox International Fund	Mutual Fund	2,368.834	(5)	(2)
Dodge & Cox Income Fund	Mutual Fund	28,800.797	(7)	(4)
Prudential Jennison Small Company Fund	Mutual Fund	5,305.418	(6)	(1)
Fidelity Floating Rate High Income	Mutual Fund	38,419.319	(7)	(4)
Virtus Contrarian Value Fund Class A	Mutual Fund	3,057.332	(5)	(1)
Ishares Trishafes Currency Hedged Msci	Stock	8,100.000	(6)	(3)
Cash	Cash Account		(4)	None
NW7652170				
Oppenheimer Developing Markets	Mutual Fund	365.418	(4)	(1)
Buffalo Discovery Fund	Mutual Fund	1,280.398	(4)	None
BBH Core Select Fund Class N	Mutual Fund	2,012.730	(5)	(1)
Templeton Global Bond Fund Class A	Mutual Fund	1,343.736	(4)	(1)
Vanguard Dividend Growth Fund	Mutual Fund	1,370.248	(5)	(1)
MFS Value Fund Class I	Mutual Fund	626.653	(4)	(1)
Fidelity Floating Rate High Income	Mutual Fund	5,154.672	(5)	(2)
FMI Large Cap Fund	Mutual Fund	2,193.384	(5)	(1)
Dodge & Cox Income Fund	Mutual Fund	4,494.681	(4)	(1)
Dodge & Cox Global Stock Fund	Mutual Fund	1,693.321	(4)	(1)
DoubleLine Total Return Bond Fund	Mutual Fund	1,246.661	(4)	(1)
Prudential Jennison Small Company Fund	Mutual Fund	888.549	(4)	(1)
Virtus Contrarian Value Fund Class A	Mutual Fund	601.240	(4)	(1)
Deutsche X-Trackers Msci Eafe Hedged	Stock	1,100.000	(5)	(1)
Cash	Cash Account		(3)	None
NW7687507				
Buffalo Discovery Fund	IRA Account	1,644.657	(5)	None
Oppenheimer Developing Markets	IRA Account	414.985	(4)	(1)
BBH Core Select Fund Class N	IRA Account	1,809.023	(5)	(1)
Templeton Global Bond Fund Class A	IRA Account	1,598.371	(4)	(1)
Vanguard Dividend Growth Fund	IRA Account	2,238.821	(5)	(1)
FMI Large Cap Fund	IRA Account	2,680.312	(5)	(1)
Dodge & Cox Income Fund	IRA Account	4,751.324	(5)	(2)
MFS Value Fund Class I	IRA Account	619.315	(4)	(1)
Prudential Jennison Small Company Fund	IRA Account	997.950	(4)	(1)
Eaton Vance Floating Rate Fund Class A	IRA Account	6,552.636	(5)	(2)
Virtus Contrarian Value Fund Class A	IRA Account	714.437	(4)	(1)
DoubleLine Total Return Bond Fund	IRA Account	2,491.377	(5)	(2)
Deutsche X-Trackers Msci Eafe Hedged	Stock	1,700.000	(5)	(2)
Cash	Cash Account		(4)	None
NW7696557				
Buffalo Discovery Fund	IRA Account	652.030	(4)	None
Dodge & Cox Income Fund	IRA Account	2,471.798	(5)	(1)
Oppenheimer Developing Markets	IRA Account	195.410	(3)	(1)
Prudential Jennison Small Company Fund	IRA Account	439.374	(3)	(1)
Vanguard Index 500 Fund Admiral Shares	IRA Account	125.302	(4)	(1)
Virtus Contrarian Value Fund Class A	IRA Account	378.019	(4)	(1)
Templeton Global Bond Fund Class A	IRA Account	687.469	(3)	(1)
Eaton Vance Floating Rate Fund Class A	IRA Account	2,571.519	(4)	(1)
Vanguard Dividend Growth Fund	IRA Account	1,623.061	(5)	(1)
Deutsche X-Trackers Msci Eafe Hedged	Stock	750.000	(4)	(1)
Cash	Cash Account		(3)	None
NW7650968				
Transamerica Asset Allocation Moderate	IRA Account	596.885	(3)	(1)
Cash	Cash Account		(1)	None