# Statement of Economic Interests

Filed in 2016 for calendar year 2015 by

Taylor, Lena Carolyn
Legislature
Senate District 04

FOR EXPLANATIONS, EXAMPLES AND EXCEPTIONS SEE THE INSTRUCTIONS OR VISIT OUR WEBSITE AT http://ethics.state.wl.us. Still have questions? For priority service send an e-mail to: 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.

<table>
<thead>
<tr>
<th>Profile Series</th>
<th>Small Cap</th>
<th>Bond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vanguard Retirement 2055</td>
<td></td>
<td>BlackRock US Debt Index</td>
</tr>
<tr>
<td>Vanguard Retirement 2045</td>
<td></td>
<td>Federated US Government Securities 2-6yr</td>
</tr>
<tr>
<td>Vanguard Retirement 2035</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanguard Retirement 2025</td>
<td>BlackRock Russell 2000 Index</td>
<td>Vanguard Long-term Investment Grade Adm</td>
</tr>
<tr>
<td>Vanguard Retirement 2016</td>
<td>DFA US Micro Cap</td>
<td></td>
</tr>
<tr>
<td>Vanguard Target Retirement Income</td>
<td>Mid Cap</td>
<td></td>
</tr>
<tr>
<td>International</td>
<td></td>
<td></td>
</tr>
<tr>
<td>American Euro Pacific Growth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BlackRock EAFE Equity Index</td>
<td>Large Cap</td>
<td>Money Market</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Vanguard Admiral</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Treasury Money Market</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Fixed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Stable Value</td>
</tr>
<tr>
<td></td>
<td></td>
<td>FDIC Bank Option</td>
</tr>
</tbody>
</table>

#### 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

**STOCKS/OPTIONS/FUTURES**

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

**BONDS**

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

**LIMITED PARTNERSHIPS**

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

**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.

<table>
<thead>
<tr>
<th>Name of business</th>
<th>Municipality or Town</th>
<th>County</th>
<th>State</th>
<th>Nature of business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taylor &amp; Associates</td>
<td>Milwaukee</td>
<td>Milwaukee</td>
<td>W</td>
<td>Law Office and real estate</td>
</tr>
<tr>
<td>Taylor Rentals</td>
<td>Milwaukee</td>
<td>Milwaukee</td>
<td>W</td>
<td>Real estate</td>
</tr>
</tbody>
</table>

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

   | Name of business | Municipality or Town | County       | State | 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

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).

<table>
<thead>
<tr>
<th>Location of property</th>
<th>Municipality or town</th>
<th>County</th>
<th>Nature of interest (e.g. own, lease, option, easement, land contract)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1018 N 35th St</td>
<td>Milwaukee</td>
<td>Milwaukee</td>
<td>own</td>
</tr>
<tr>
<td>3407 W Highland Blvd</td>
<td>Milwaukee</td>
<td>Milwaukee</td>
<td>own</td>
</tr>
<tr>
<td>3413-15 W Highland Blvd</td>
<td>Milwaukee</td>
<td>Milwaukee</td>
<td>own</td>
</tr>
<tr>
<td>3428 W State St</td>
<td>Milwaukee</td>
<td>Milwaukee</td>
<td>own</td>
</tr>
<tr>
<td>4039 N 15th St</td>
<td>Milwaukee</td>
<td>Milwaukee</td>
<td>own</td>
</tr>
</tbody>
</table>
6. **OFFICERS AND DIRECTORS** List organizations of which you or a family member was an officer or director (unless already listed in item 2).

<table>
<thead>
<tr>
<th>Business or organization</th>
<th>City</th>
<th>State</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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).

<table>
<thead>
<tr>
<th>Business or organization</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Milw.</td>
<td>WI</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Creditor</th>
<th>City</th>
<th>State</th>
<th>$5,000 to $50,000</th>
<th>More than $50,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chase Bank</td>
<td>Milwaukee</td>
<td>WI</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>Landmark Credit Union</td>
<td>Milwaukee</td>
<td>WI</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>Nation Star</td>
<td>Milwaukee</td>
<td>WI</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>Seaway Bank</td>
<td>Milwaukee</td>
<td>WI</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>U.S. Bank</td>
<td>Milwaukee</td>
<td>WI</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>Waterstone Bank</td>
<td>Milwaukee</td>
<td>WI</td>
<td>☐</td>
<td>☑</td>
</tr>
</tbody>
</table>

Part B

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

<table>
<thead>
<tr>
<th>Name of employer (if State of Wisconsin, also identify agency or institution)</th>
<th>City</th>
<th>State</th>
<th>Nature of employer's business</th>
</tr>
</thead>
<tbody>
<tr>
<td>PKSD Law Firm</td>
<td>Milw.</td>
<td>WI</td>
<td>Law</td>
</tr>
<tr>
<td>State of WI - Legislature</td>
<td>Madison</td>
<td>WI</td>
<td>State Government</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Source of income</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hausman-McNally SC</td>
<td>Milwaukee</td>
<td>WI</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Name of provider</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
</table>
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.

<table>
<thead>
<tr>
<th>Payer</th>
<th>Approximate value of expenses</th>
<th>Amount of honorarium</th>
<th>Circumstances of receipt</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*See Attached*

**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.

*Signature of person filing*

Daytime phone #: (608) 266-6810

Sen.Taylor@legis.wisconsin.gov

Date: 4/29/16

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

_GAB 901 Personalized. For use in 2016_
Economic Interest Report – Attachment
Senator Lena C. Taylor
2015

January 2015
None

February 2015
2/26/2015
American Association of Blacks in Energy Conference
W Hotel
Washington DC
AABEC Paid: Hotel $439.00 and Travel $629.20
Reimbursement: $84.28

March 2015
None

April 2015
4/25/2015
African American Democratic Caucus
Bahia Mar Hotel
Ft. Lauderdale FL
AADC Paid: Travel $ 470.00 and Hotel $ 198.69
Reimbursement: $0.00

May 2015
5/1-3/2015
BILLD Steering Committee Meeting
Palmer House Hotel
Chicago IL
BILLD Paid First Evening Accommodations: Hotel $ 186.00
Reimbursement: $5.10

5/8-9
WAND Education Board Meeting
Cambridge, MA
WAND Scholarship covered: travel $500.00 and Hotel $260.00
Reimbursement: $92.14
June 2015
None

July 2015
None

August 2015

08-30-2015
Guest Speaker
Grace Fellowship Church
Milwaukee WI
Honorarium - $200.00

September 2015
None

October 2015

10/1-3/2015
The Six Conference
Scholarship - Travel $350.00
Air Fare $213.00
Hyatt Regency $358.00
Washington DC
Reimbursement: Travel - $103.99

10/4-6/2015
WILL/WAND Board Meeting & Conference
Washington DC
WILL/WAND Scholarship covered Hotel and Travel
Hyatt Regency - $437.00
Air Fare $213.00
Reimbursement: $43.42

10/17/2015
Nat’l Black Child Development Institute Conference
Crystal Gateway Marriott
Arlington VA
Black Child Development Institute Paid: Hotel and Travel
Air Fare - $331.18
Hotel - $340.00
Reimbursement: $140.01

10/31/15
UWM/National McNair Conference
Keynote Speaker
Lake Lawn Resort
Delavan WI
Honorarium $500.00

November 2015

11/6-9/2015
Aspen Rodel Conference
Legislators Meeting and All Class Reunion
Scholarship – Hotel and Travel
Omni Shoreham Hotel
Washington DC
Air Fare $382.60
Hotel $567.00
Reimbursements: $91.31

December 2015

12/2-5/2015
National Black Caucus of State Legislators
Hyatt Regency Century Plaza
Los Angeles CA
Scholarship $500.00 Travel and 2 out of 5 nights at hotel
Air Fare: $630.96
Hotels: 692.97
Reimbursements: 1,124.36