

# Statement of Economic Interests

Filed in 2017 for calendar year 2016 by

RECEIVED

JAN 23 2017

BY: .....

**Mason, Cory**

Legislature  
Assembly District 66

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

**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.

A

	\$5,000 to \$50,000	More than \$50,000		\$5,000 to \$50,000	More than \$50,000		\$5,000 to \$50,000	More than \$50,000
<b>Profile Series</b>			<b>Small Cap</b>			<b>Bond</b>		
Vanguard Retirement 2055	<input checked="" 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>		
<b>International</b>			Calvert Social Investment Equity	<input type="checkbox"/>	<input type="checkbox"/>	Stable Value	<input type="checkbox"/>	<input type="checkbox"/>
American Euro Pacific Growth	<input type="checkbox"/>	<input type="checkbox"/>	Fidelity Contrafund	<input type="checkbox"/>	<input type="checkbox"/>	FDIC Bank Option	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock EAFE Equity Index	<input type="checkbox"/>	<input type="checkbox"/>	Vanguard Institutional Index Plus	<input type="checkbox"/>	<input type="checkbox"/>			
			Vanguard Wellington-Admiral Shares	<input checked="" 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

BMO Growth Balanced	<input type="checkbox"/>	<input checked="" 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

	<input type="checkbox"/>	<input type="checkbox"/>
	<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
Rebecca Mason Law, LLC	Racine	Racine	WI	Law Firm

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
3611 Kinzie Avenue <del>Rental Property</del>	Racine	Racine	WI	Rental Property

**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)
3611 Kinzie Avenue	Racine	Racine	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
Great Lakes Legislative <i>Caucus</i>	Chicago	IL	Chair
Racine Zoological Society	Racine	WI	Board Member
Small World Montessori School	Racine	WI	Board Member
United Way of Racine County	Racine	WI	Board Member

**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
City of Racine	Racine	WI
Yes For Our Children's Future	?	?
<i>see attached</i>	<i>Racine</i>	<i>WI</i>

**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
American Education Services	Sacramento	CA	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bank of Deerfield	Deerfield	WI	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Barclays	Wilmington	DE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tri-City Bank	Racine	WI	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			<input 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
Rebecca Mason Law, LLC	Racine	WI	Law Firm
State of WI - Legislature	Madison	WI	State Government
<i>City of Racine</i>	<i>Racine</i>	<i>WI</i>	<i>Municipal Judge</i>

**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

**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
<i>see attached</i>		

**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
<i>See attached</i>			

**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.*

In Item 7, please continue to submit an affidavit on an annual basis.

**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.

<i>Cory Mason</i>	<i>18/Jan/17</i>	Daytime phone # (608) 266-0634
Signature of person filing	Date	E-mail address <i>C.Mason@legis.wisconsin.gov</i>

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.

Mail, email or fax to: Wisconsin Ethics Commission, P.O. Box 7984, Madison, WI 53707-7984;  
Email: [Ethics@wi.gov](mailto:Ethics@wi.gov); Fax: (608) 264-9319

ETHFR-901 Personalized. For use in 2017.

*Signature of person filing*      *Date*      *E-mail address*

*Cory Mason*

**Attachment 1**

**Mason, Cory**

**Statement of Economic Interests**

**As of December 31, 2016**

**Business Interests, Agents, Representatives, and/or Spokespersons**

My spouse, Rebecca Kathryn Mason, on December 31, 2016, had an ownership interest of 10% or more in Rebecca Mason Law, LLC.

I have asked my wife her for a list of her business interest, agents, representatives or spokespersons, in payments for 2016, and my spouse has not provided that information citing attorney-client privilege. However, based on Rebecca Mason's own Statement of Economic Interests provided to the State of Wisconsin as a Municipal Judge, please see the below list indicating certain Business Interests, Agents, Representative, or Spokespersons publicly reported by Judge Mason, as cited in Part A3 and Part A7 of her Statement of Economic Interests.


Part A3

Racine Education Uniserv Council, Racine, WI

Part A7

Business Organization	City	State
Barre District	Mt. Pleasant	WI
Dolphin House, LLC	Burlington	WI
Family Power Music	Racine	WI
R&J New Tires LLC	Racine	WI
S.E. Wisconsin Hearing Center, Inc.	Racine	WI
sjdl consulting, LLC	Racine	WI
Yoga Roots Racine	Racine	WI

Sincerely,



Cory Mason  
State Representative  
66th Assembly District



**Attachment 2**

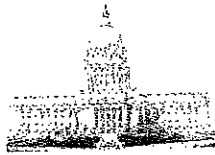
**Mason, Cory**

**Statement of Economic Interests**

**As of December 31, 2016**

**Part B12 Honoraria and Expenses**

- **SIX Conference December 4-6, 2016**
- **NCEL Conference December 3-4, 2016**
- **GLLC Conference, July 15-16, 2016**
- **CGLR Conference, April 24-26, 2016**



STATE REPRESENTATIVE  
**CORY MASON**

WISCONSIN STATE ASSEMBLY  
66TH ASSEMBLY DISTRICT  
REPRESENTING THE RACINE COMMUNITY

January 18, 2017

Adam Harvell  
Wisconsin Ethics Commission  
212 East Washington, 3<sup>rd</sup> Floor  
Madison, WI 53703-7984

Dear Adam,

This letter is to notify the Wisconsin Ethics Commission of expenses paid pursuant to Wis. Stats. Secs. 19.44 and 19.56.

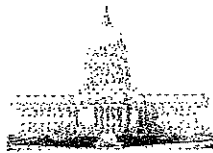
I received a scholarship to attend a conference held by the State Innovation Exchange (SIX) from December 4-6, 2016 in Washington, DC. The State Innovation Exchange is a non-partisan, nationwide organization providing support to state legislators. The State Innovation Exchange was founded in Wisconsin. The mailing address for the organization is P.O. Box 60230 Madison, WI 53726-0230. Should you have any additional questions about the event you may call SIX at (608) 440-8255.

The scholarship included expenses in the approximate amount of \$560. Please let me know if you need any additional information relevant to my reporting obligations under Wisconsin's Ethics Law.

Sincerely,

**Cory Mason**  
State Representative  
66th Assembly District





STATE REPRESENTATIVE  
**CORY MASON**

WISCONSIN STATE ASSEMBLY  
66TH ASSEMBLY DISTRICT  
*REPRESENTING THE RACINE COMMUNITY*

January 18, 2017

Adam Harvell  
Wisconsin Ethics Commission  
212 East Washington, 3<sup>rd</sup> Floor  
Madison, WI 53703-7984

Dear Adam,

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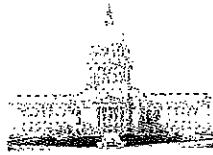
I received a scholarship to attend a meeting of the National Caucus of Environmental Legislators (NCEL) on December 3 and December 4, 2016. The NCEL is a non-partisan, nationwide network of over 1,000 state legislators representing all 50 states serving as a resource on environmental issues through legislative research, organized events, and by facilitating collaboration between lawmakers working on similar issues. The National Caucus of Environment Legislators is headquartered at 218 D Street SE, 1<sup>st</sup> Floor, Washington, DC 20003 and the Midwest Regional Coordinator is the Honorable Jane Krentz.

The scholarship included the partial cost of transportation. The total estimated value of expenses paid for by the NCEL is approximately \$300.

Please let me know if you need any additional information relevant to my reporting obligations under Wisconsin's Ethics Law.

Sincerely,

**Cory Mason**  
State Representative  
66th Assembly District



STATE REPRESENTATIVE  
**CORY MASON**

WISCONSIN STATE ASSEMBLY  
66TH ASSEMBLY DISTRICT  
*REPRESENTING THE RACINE COMMUNITY*

January 18, 2017

Adam Harvell  
Wisconsin Ethics Commission  
212 East Washington, 3<sup>rd</sup> Floor  
Madison, WI 53703-7984

Dear Adam,

This letter is to notify the Wisconsin Ethics Commission. Board of expenses paid pursuant to Wis. Stats. Secs. 19.44 and 19.56.

I received a scholarship to attend and lead the Great Lakes Legislative Caucus Annual Meeting on July 15, 2016 and July 16, 2016. I am the Chair of the Great Lakes Legislative Caucus, a binational, nonpartisan group of state and provincial legislators dedicated to environmental protection and economic development of the Great Lakes region.

The scholarship included mileage reimbursement for automobile travel in the amount of \$59.50. If you have further questions about this event, you may contact Great lakes Legislative Caucus Program Director Lisa Janairo at (920) 458-5910.

Please let me know if you need any additional information relevant to my reporting obligations under Wisconsin's Ethics Law.

Sincerely,

Cory Mason  
State Representative  
66th Assembly District



STATE REPRESENTATIVE  
**CORY MASON**

WISCONSIN STATE ASSEMBLY  
66TH ASSEMBLY DISTRICT  
*REPRESENTING THE RACINE COMMUNITY*

January 18, 2017

Adam Harvell  
Wisconsin Ethics Commission  
212 East Washington, 3<sup>rd</sup> Floor  
Madison, WI 53703-7984

Dear Adam,

This letter is to notify the Wisconsin Ethics Commission of expenses paid pursuant to Wis. Stats. Secs. 19.44 and 19.56.

I received a scholarship to attend and speak to the Council of the Great Lakes Region's 2016's Great Lakes Economic Forum. This event was held in Toronto, Ontario, Canada on April 24-26, 2016.

The scholarship included airfare and hotel expenses valued at approximately \$1000.00. If you have further questions about this event, you may contact Council of the Great Lakes Region Executive Director Mark Fisher at (613) 668-2044.

Please let me know if you need any additional information relevant to my reporting obligations under Wisconsin's Ethics Law.

Sincerely,

Cory Mason  
State Representative  
66th Assembly District

