Filing ID #10008404

Financial Disclosure Report

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Filer Information

Name: Mr. Eric R Kingson
Status: Congressional Candidate
State/District: NY24

Filing Information

Filing Type: Candidate Report
Filing Year: 2015
Filing Date: 11/5/2015

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Ameriprise Insured Money Market	SP	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Blackrock Multi Asset Income	SP	$15,001 - $50,000	Dividends	$1,001 - $2,500	$1,001 - $2,500
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ BP p.l.c. (BP)	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Citigroup, Inc. (C)	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Coca-Cola Company (KO)	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Exxon Mobil Corporation (XOM)	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Fidelity Advisor Biotechnology Fund	SP	$15,001 - $50,000	Dividends	None	None
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Fidelity Advisor Municipal Income	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ General Electric Company (GE)	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ iShares Global Financial ETF (IXG)	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Johnson & Johnson (JNJ)	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Lowe's Companies, Inc. (LOW)	SP	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ MFS Diversified Income	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Microsoft Corporation (MSFT)	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Putnam Diversified Income	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Virtus Multi Sector Short Term Bond	SP	$15,001 - $50,000	Dividends	$1,001 - $2,500	$1,001 - $2,500
Ameriprise Brokerage Account (Wife-Nancy Smith) ⇒ Whole Foods Market, Inc. (WFM)	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith) ⇒		$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Century Equity Income CLA					
Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith) ⇒ Ameriprise Insured Money Market		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith) ⇒ Blackrock Multi Asset Income Investor		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith) ⇒ Columbia Limited Duration Credit		$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith) ⇒ Fidelity Advisor Floating Rate High Income		$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith) ⇒ MFS Diversified Income		$15,001 - $50,000	Dividends	$1,001 - $2,500	$1,001 - $2,500
Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith) ⇒ Morgan Stanley Capital Trust		$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith) ⇒ Putnam Diversified Income		$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith) ⇒ Virtus Senior Floating Rate		$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Fidelity Account for JFKingson Trust ⇒ JFKingson Trust		$1,001 - $15,000	Interest	None	None
Fidelity Cash Brokerage Account (Personal holdings-Eric) ⇒ Emisphere Technologies, Inc. (EMIS)		$1,001 - $15,000	Dividends	None	None
Fidelity Cash Brokerage Account (Personal holdings-Eric) ⇒ Fidelity Cash Account		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Fidelity IRAs (Personal holdings-Eric) ⇒		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
3M Company (MMM)					
Fidelity IRAs (Personal holdings-Eric) ⇒ Costco Wholesale Corporation (COST)		$1,001 - $15,000	Tax-Deferred		
Fidelity IRAs (Personal holdings-Eric) ⇒ Costco Wholesale Corporation (COST)		$1,001 - $15,000	Tax-Deferred		
Fidelity IRAs (Personal holdings-Eric) ⇒ Emisphere Technologies, Inc. (EMIS)		$1,001 - $15,000	Tax-Deferred		
Fidelity IRAs (Personal holdings-Eric) ⇒ Hewlett-Packard Company (HPQ)		$1,001 - $15,000	Tax-Deferred		
Fidelity IRAs (Personal holdings-Eric) ⇒ NetApp, Inc. (NTAP)		$1 - $1,000	Tax-Deferred		
Fidelity IRAs (Personal holdings-Eric) ⇒ Phillips 66 (PSX)		$1,001 - $15,000	Tax-Deferred		
Fidelity IRAs (Personal holdings-Eric) ⇒ PowerShares WilderHill Clean Energy Portfolio (PBW)		$1,001 - $15,000	Tax-Deferred		
Fidelity IRAs (Personal holdings-Eric) ⇒ Procter & Gamble Company (PG)		$1,001 - $15,000	Tax-Deferred		
Fidelity IRAs (Personal holdings-Eric) ⇒ Vulcan Materials Company (VMC)		$1,001 - $15,000	Tax-Deferred		
Howard Capital/Fidelity Cash Brokerage Account (Wife-Nancy Smith) ⇒ Nancy H. Smith Individual Brokerage Account		$50,001 - $100,000	Dividends	$201 - $1,000	$201 - $1,000
Howard Capital/Fidelity IRAs (Wife-Nancy Smith) ⇒ Nancy Smith-Rollover IRA-Fidelity Trust Manager		$100,001 - $250,000	Tax-Deferred		
Howard Capital/Fidelity IRAs (Wife-Nancy Smith) ⇒ Nancy Smith-ROTH Individual Account IRA-Fidelity Trust Manager		$1,001 - $15,000	Tax-Deferred		
M&T Bank Accounts ⇒ M&T Bank - Checking for Nancy Smith		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
M&T Bank Accounts ⇒		$1,001 - $15,000	Interest	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
M&T Bank Checking (Eric)					
M&T Bank Accounts ⇒ M&T Checking Account for Nancy H. Smith Consulting		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
M&T Bank Accounts ⇒ M&T Savings Account for Sarah Smith		$15,001 - $50,000	Interest	$201 - $1,000	$201 - $1,000
New York's 529 College Savings Program Direct Plan (Personal holdings-Eric) ⇒ Aggressive Growth Portfolio (for Sarah Smith-daughter) LOCATION: NY DESCRIPTION: College fund for 16 year old daughter	DC	$1,001 - $15,000	Tax-Deferred		
New York's 529 College Savings Program Direct Plan (Personal holdings-Eric) ⇒ Growth Portfolio (for Samuel Hyland-Grandson) LOCATION: NY DESCRIPTION: College savings account	DC	$1,001 - $15,000	Tax-Deferred		
New York's 529 College Savings Program Direct Plan (Personal holdings-Eric) ⇒ Income Portfolio (for Johanna Hyland-daughter) LOCATION: NY DESCRIPTION: Balance transferred to son who is in doctoral program	DC	None	Tax-Deferred		
New York's 529 College Savings Program Direct Plan (Personal holdings-Eric) ⇒ Income Portfolio (for Matthew Kingson-nephew) LOCATION: NY DESCRIPTION: Helped pay for nephew's college	DC	$1,001 - $15,000	Tax-Deferred		
New York's 529 College Savings Program Direct Plan (Personal holdings-Eric) ⇒ Interest Accumulation Portfolio (for Aaron Kingson - son) LOCATION: NY DESCRIPTION: Also has $6.08 in Income Portfolio	DC	$1,001 - $15,000	Tax-Deferred		
Psilos (Joan F. Kingson Testamentary Trust) First wife-died 2001 ⇒ Psilos Class A Liquidating Trust		$15,001 - $50,000	Capital Gains	$201 - $1,000	$2,501 - $5,000
Psilos (Joan F. Kingson Testamentary Trust) First wife-died 2001 ⇒		$50,001 - $100,000	Capital Gains	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Psilos III					
Psilos (Joan F. Kingson Testamentary Trust) First wife-died 2001 ⇒ PSILOS/CAREGIVER CO-INVESTMENT,		$50,001 - $100,000	Capital Gains	None	None
Psilos (Joan F. Kingson Testamentary Trust) First wife-died 2001 ⇒ PSILOS/SEECHANGE CO-INVESTMENT		$50,001 - $100,000	Capital Gains	None	None
Psilos (Personal holdings-Eric) ⇒ Class A Direct Liquidating Trust		$15,001 - $50,000	Capital Gains	$201 - $1,000	$2,501 - $5,000
Psilos (Personal holdings-Eric) ⇒ PSILOS/Health Edge Co-Investment		$100,001 - $250,000	None		
Royalties from New Press Description: EricShare - royalty advance when book contract signed and royalties from sales		$1,001 - $15,000	Royalties	$2,501 - $5,000	None
TIAA-CREF (Personal holdings-Eric) ⇒ American Funds EuroPacific Growth Fund Description: Fund within TIAA-CREF (jt)		$1,001 - $15,000	Tax-Deferred		
TIAA-CREF (Personal holdings-Eric) ⇒ CREF Global Equities Description: Fund within TIAA-CREF (JT)		$100,001 - $250,000	Tax-Deferred		
TIAA-CREF (Personal holdings-Eric) ⇒ CREF Growth R Description: Fund within TIAA-CREF (JT)		$100,001 - $250,000	Tax-Deferred		
TIAA-CREF (Personal holdings-Eric) ⇒ CREF Social Choice Description: Fund within TIAA-CREF (JT)		$100,001 - $250,000	Tax-Deferred		
TIAA-CREF (Personal holdings-Eric) ⇒ CREFStock Description: Fund within TIAA-CREF (JT)		$250,001 - $500,000	Tax-Deferred		
TIAA-CREF (Personal holdings-Eric) ⇒ T Rowe Price Blue Chip Description: Fund within TIAA CREF (JT)		$1,001 - $15,000	Tax-Deferred		
TIAA-CREF (Personal holdings-Eric) ⇒		$100,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TIAA Real Estate DESCRIPTION: Fund within TIAA-CREF (JT)		$250,000			
TIAA-CREF (Personal holdings-Eric) ⇒ TIAA Real Estate DESCRIPTION: Fund within TIAA-CREF (JT)		$100,001 - $250,000	Tax-Deferred		
TIAA-CREF (Personal holdings-Eric) ⇒ TIAA Traditional DESCRIPTION: Fund within TIAA-CREF (JT)		$250,001 - $500,000	Tax-Deferred		
TIAA-CREF (Personal holdings-Eric) ⇒ Vanguard Institutional Index Fund DESCRIPTION: Fund within TIAA-CREF (JT)		$50,001 - $100,000	Tax-Deferred		
TIAA-CREF (Personal holdings-Eric) ⇒ Voya Real Estate Fund DESCRIPTION: Fund within TIAA-CREF (JT)		$15,001 - $50,000	Tax-Deferred		
TIAA-CREF (wife's) ⇒ CREF Stock DESCRIPTION: Wife's TIAA - CREF retirement account		$15,001 - $50,000	Tax-Deferred		
TIAA-CREF (wife's) ⇒ TIAA Traditional DESCRIPTION: Wife's TIAA - CREF retirement account		$50,001 - $100,000	Tax-Deferred		
VOYA Finnacial (Wife-Nancy Smith) ⇒ Global/International		$15,001 - $50,000	Tax-Deferred		
VOYA Finnacial (Wife-Nancy Smith) ⇒ Pioneer Equity Income vFund		$15,001 - $50,000	Tax-Deferred		
VOYA Finnacial (Wife-Nancy Smith) ⇒ T Rowe Price Capital Appreciation		$100,001 - $250,000	Tax-Deferred		

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Syracuse University	Eric's salary	$144,929	$142,087

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Social Security Works	EricConsultation	$33,600	$52,800
Health Advancement Collaborative of Central New York	Wife's Consulting Practice Nancy H. Smith Consulting	N/A	N/A
SUNY Upstate Medical University	Wife's Consulting Practice Nancy H. Smith Consulting	N/A	N/A
National School Climate Center	Wife's Consulting Practice Nancy H. Smith Consulting	N/A	N/A
The SUNY Foundation	Wife's Consulting Practice Nancy H. Smith Consulting	N/A	N/A
F.O.C.U.S. Greater Syracuse	Wife's Consulting Practice Nancy H. Smith Consulting	N/A	N/A
Apter & O'Connor	Wife's Consulting Practice Nancy H. Smith Consulting	N/A	N/A
Cayuga County Community Health Network	Wife's Consulting Practice Nancy H. Smith Consulting	N/A	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

Position	Name of Organization
Chair, Board of Directors	Social Security Works
Comments: Chaired 501C3 board until July when I filed for candidacy. I am now on leave as chair and as member of board.	
Chair, Board of Directors	Social Security Works Education Fund
Comments: Chaired 501C4 board until July when I filed for candidacy. I am now on leave as chair and as member of board.	
Member, Board of Directors	National Academy of Social Insurance
Comments: Elected to board in 2015. Resigned from board after I filed to be candidate for NY-24	

Schedule F: Agreements

None disclosed.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Asset Class Details

- Ameriprise Brokerage Account (Wife-Nancy Smith) (Owner: SP)
  Location: US
- Amerprise Strategic Portfolio Service Advantage (wife-Nancy Smith)
  Location: US
- Fidelity Account for JFKingson Trust
- Fidelity Cash Brokerage Account (Personal holdings-Eric)
  Location: US
- Fidelity IRAs (Personal holdings-Eric)
  Description: Total holdings about $39,000
- Howard Capital/Fidelity Cash Brokerage Account (Wife-Nancy Smith)
  Location: US
- Howard Capital/Fidelity IRAs (Wife-Nancy Smith)
- M&T Bank Accounts
  Location: US
- New York's 529 College Savings Program Direct Plan (Personal holdings-Eric) (Owner: DC)
  Location: NY
  Description: Have a 529 fund with accounts for son, 2 daughters, grandson and nephew
- Psilos (Joan F. Kingson Testamentary Trust) First wife-died 2001
- Psilos (Personal holdings-Eric)
- TIAA-CREF (Personal holdings-Eric)
- TIAA-CREF (wife's)
- VOYA Finnacial (Wife-Nancy Smith)

Exclusions of Spouse, Dependent, or Trust Information

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

○ Yes ◉ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

○ Yes ◉ No

Certification and Signature

☑ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Mr. Eric R Kingson , 11/5/2015