Filing ID #10014460

Financial Disclosure Report

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Filer Information

Name: Hon. Ann Kirkpatrick
Status: Former Member
State/District: AZ01

Filing Information

Filing Type: Terminated Filer Report
Filing Year: 2017
Filing Date: 01/22/2017

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Arizona State Credit Union Accounts	JT	$1,001 - $15,000	Interest	$1 - $200	
Curley & Allison LLP Partnership Interest Location: Phoenix/Maricopa, AZ, US Description: Interest in Law Partnership	SP	$15,001 - $50,000	None		
Edward Jones IRA ⇒ Cash		$50,001 - $100,000	Interest	$1 - $200	
Edward Jones IRA ⇒ SPDR S&P 500 ETF TR UNIT SERIES I S&P DEPOSITORY		$50,001 - $100,000	Dividends	$1,001 - $2,500	
Edward Jones ROTH IRA ⇒ Cash		$1,001 - $15,000	Interest	$1 - $200	
Edward Jones ROTH IRA ⇒ IShares S&P 500 Index Fund		$50,001 - $100,000	Capital Gains, Dividends	$1,001 - $2,500	
Fidelity IRA ⇒ Cash	SP	$15,001 - $50,000	Dividends	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity IRA ⇒ Fidelity NASDAQ Composite Index	SP	$50,001 - $100,000	Dividends	$1,001 - $2,500	☐
Fidelity IRA ⇒ Spartan Total Market Index Fund Adv Class	SP	$500,001 - $1,000,000	Dividends	$5,001 - $15,000	☐
Penn Mutual Whole Life Insurance	SP	$1,001 - $15,000	None		☐
Vanguard Investments ⇒ Vaguard Tax Exempt Money Market	JT	$1,001 - $15,000	Interest	$1 - $200	☐
Vanguard Investments ⇒ Vanguard 500 Index Fund Admiral Shares	JT	$50,001 - $100,000	Dividends	$1,001 - $2,500	☐
Vanguard Investments ⇒ Vanguard Total Stock Market Index Fund	JT	$15,001 - $50,000	Dividends	$201 - $1,000	☑
Wells Fargo Bank Accounts	JT	$15,001 - $50,000	Interest	$1 - $200	☐
Wells Fargo IRA ⇒ Cash	SP	$100,001 - $250,000	Interest	$1 - $200	☐
Wells Fargo SIMPLE IRA ⇒ Cash	JT	$100,001 - $250,000	Interest	$1 - $200	☐
Wells Fargo SIMPLE IRA ⇒ Wells Fargo Advantage Emerging Growth Fund	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐

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

Schedule B: Transactions

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Fidelity IRA ⇒ Spartan Total Market Index Fund Adv Class	SP	04/15/2016	P	$1,001 - $15,000	
Fidelity IRA ⇒ Spartan Total Market Index Fund Adv Class	SP	12/16/2016	P	$1,001 - $15,000	
Vanguard Investments ⇒ Vanguard Stock Market Index Fund	JT	04/18/2016	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Vanguard Investments ⇒ Vanguard Stock Market Index Fund	JT	10/14/2016	P	$15,001 - $50,000	

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

Schedule C: Earned Income

Source	Type	Amount
Curley & Allison LLP	Spouse Salary	$250,000.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Bank	June 2006	Mortgage on principal residence	$250,001 - $500,000
JT	Wells Fargo Bank Visa Credit Card	Various	Credit card charges	$15,001 - $50,000
JT	Bank of America	January 2016	Credit card advance	$15,001 - $50,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

None disclosed.

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Asset Class Details

- Edward Jones IRA

- Edward Jones ROTH IRA
- Fidelity IRA (Owner: SP)
- Vanguard Investments (100% Interest) (Owner: JT)
  LOCATION: US
- Wells Fargo IRA (Owner: SP)
- Wells Fargo SIMPLE IRA (Owner: JT)

Exclusions of Spouse, Dependent, or Trust Information

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

○ Yes ◉ No

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: Hon. Ann Kirkpatrick , 01/22/2017