Filing ID #10018617

Financial Disclosure Report

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Filer Information

Name: William Tanoos
Status: Congressional Candidate
State/District: IN08

Filing Information

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 08/17/2017

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 College Savings Account		$1,001 - $15,000	Dividends	None	None
Description: This is a 529 college savings plan that was set up last year (end of 2016) and owned by my grandmother for the benefit of my dependent child.					
First Financial Bank Accounts	JT	$100,001 - $250,000	Interest	$1 - $200	Not Applicable
Description: These accounts were opened this year (2017), so there is no preceding year interest income.					
Joint ETF & Closed End Funds ⇒ Cash & Money Market	JT	$100,001 - $250,000	Interest	None	None
Description: Funds were transferred to this account recently in 2017, thus no interest has been accrued.					
Joint ETF & Closed End Funds ⇒ iShares Core MSCI EAFE ETF (IEFA)	JT	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
Joint ETF & Closed End Funds ⇒ iShares Core S&P 500 ETF (IVV)	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Joint ETF & Closed End Funds ⇒ iShares Core S&P Mid-Cap ETF (IJH)	JT	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Joint ETF & Closed End Funds ⇒	JT	$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
iShares Core S&P Small-Cap ETF (IJR)					
Joint ETF & Closed End Funds ⇒ Schwab Emerging Markets Equity ETF (SCHE)	JT	$1,001 - $15,000	Dividends	$1 - $200	None
Kathryn Tanoos 401K ⇒ American Funds New Perspective Ret Opt	SP	$1,001 - $15,000	Tax-Deferred		
Kathryn Tanoos 401K ⇒ Ivy Mid Cap Growth Ret Opt	SP	$1 - $1,000	Tax-Deferred		
Kathryn Tanoos 401K ⇒ Transamerica Partners Stock Index Ret Opt	SP	$1,001 - $15,000	Tax-Deferred		
Kathryn Tanoos 401K ⇒ Vanguard Small-Cap Index Ret Opt	SP	$1,001 - $15,000	Tax-Deferred		
U.S. Savings Bond		$1 - $1,000	Interest	$1 - $200	None
Description: This is a $50 U.S. Savings Bond issued 09/1983. It matured 09/2013 with a total interest of $90.32.					
U.S. Savings Bonds	SP	$1,001 - $15,000	Interest	Not Applicable	Not Applicable
Description: These are three (3) U.S. Savings Bonds owned by my spouse that do not mature until 06/2033, 01/2034, and 01/2037 respectively. Per U.S. House of Representatives Committee on Ethics Financial Disclosure Statements Instruction Guide, the interest is not reportable until maturity.					
Universal Life Option 1 - State Farm - Premium Paying Policy	JT	$15,001 - $50,000	Interest	None	None
Description: This is a universal life policy from State Farm for our dependent child. Per U.S. House of Representatives Committee on Ethics Financial Disclosure Statements Instruction Guide, I am required to disclose only the name of the insurance company, the type of policy, and the category of the policy's year-end cash value. I am not required to disclose income generated by universal life policies.					
WTT Roth IRA ⇒ SCHWAB TARGET 2040 FUND		$1,001 - $15,000	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
Fleschner, Stark, Tanoos & Newlin	Salary	$54,950.00	$87,725.00
Worthe Real Estate Group	Spouse Salary	N/A	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

Position	Name of Organization
Board of Directors	Vigo County Historical Society
Principal	The Drunk, LLC

Schedule F: Agreements

None disclosed.

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

None disclosed.

Schedule A Asset Class Details

- Joint ETF & Closed End Funds (Owner: JT)
  Location: US
- Kathryn Tanoos 401K (Owner: SP)
- WTT Roth IRA

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: William Tanoos , 08/17/2017