Filing ID #10019226

Financial Disclosure Report

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Filer Information

Name: Mary Patricia Hackett
Status: Congressional Candidate
State/District: IN02

Filing Information

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 02/16/2018
Period Covered: 01/01/2017– 01/31/2018

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1st Source Agency Account ⇒ Federated Govt Obl Fd-Prm		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
1st Source Checking Account	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
1st Source IRA ⇒ BlackRock Strat Inc Opp - Ins		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ Boston Partners INV All Cap Val Inst		$50,001 - $100,000	Tax-Deferred		
1st Source IRA ⇒ Dodge & Cox Intl Stock Fd		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ Federated Govt Obli Fd - Prm		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ Federated Inst HI Yld Bond Fund		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1st Source IRA ⇒ Fidelity contrafund		$50,001 - $100,000	Tax-Deferred		
1st Source IRA ⇒ Metropolitan West Total Return Bd		$15,001 - $50,000	Tax-Deferred		
1st Source IRA ⇒ Morgan Stanley Ins Intl Eq-l		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ Nuveen Preferred Securit -I		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ Sterling Cap Str S/C Val - Ins		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ T Rowe Pr Mid Cap Grow-l		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ Templeton Global Bond Fund		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ Vanguard MSCI Emerging Markets ETF		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ Vanguard S/T Invest Gr - Adm		$1,001 - $15,000	Tax-Deferred		
1st Source IRA ⇒ Wasatch - 1st Source Income Fund		$15,001 - $50,000	Tax-Deferred		
Hackett & Associates, PC (S corporation), 100% Interest LOCATION: South Bend, IN, US DESCRIPTION: Law Firm located in South Bend, IN S Corporation distributions are reported under earned income		$250,001 - $500,000	None		
Harpercollins Publishers - Book Royalties DESCRIPTION: royalties from theological book.		None	Royalties	$1,001 - $2,500	$1,001 - $2,500
John Hancock Investments ⇒ New Opportunities A	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	$1 - $200
John Hancock Investments ⇒ Small Company A	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
John Hancock Investments IRA ⇒ New Opportunities A	SP	$15,001 - $50,000	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
Hackett & Associates P.C.	Salary	$31,055.36	$64,290.76
University of Notre Dame	Salary	$5,100.00	$5,100.00
Hackett & Associates P.C.	S Corporation distributions	$145,400.00	$29,433.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Dept. of Education Fedloan Servicing	1/10/11 -07/16/12	Student Loans	$15,001 - $50,000
	1st Source Bank	February 2016	Line of credit	$100,001 - $250,000
	1st Source Bank	February 2016	Loan to Hackett & Assoc. personally guaranteed by Candidate	$50,001 - $100,000

Schedule E: Positions

Position	Name of Organization
Shareholder and President	Hackett and Associates, PC
Treasurer Comments: Position ended 6/30/16.	Community Foundation of St. Joseph County

Schedule F: Agreements

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Confidential clients not reported (South Bend, IN, US)	legal services

COMMENTS: Under IN Rule of Prof. Conduct Section 1.6 confidential client information cannot be provided

Schedule A Asset Class Details

- 1st Source Agency Account
  LOCATION: US
- 1st Source IRA
- John Hancock Investments (Owner: SP)
  LOCATION: US
- John Hancock Investments IRA (Owner: SP)

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

Comments

The reporting period for this Report is January 1, 2016 - January 31, 2018. The current year figures include data from January 1, 2017 through January 31, 2018. The prior year figures are for calendar year 2016.

Certification and Signature

[x] 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: Mary Patricia Hackett , 02/16/2018