



# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Kimberlin Brown Pelzer  
**Status:** Congressional Candidate  
**State/District:** CA36

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 01/9/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Action Beach Inc	JT	\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: San Diego, CA, US					
DESCRIPTION: The company operates out of 7 locations, renting equipment for beach, water and land activities.					
Callaway Golf Company (ELY)	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab (Cash)	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Charles Schwab SEP IRA ⇒ AIG Focused Dividend Strategy Fund (FDSAX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Alger Cap Appreciation (ACAAX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Blackrock Commodity Strategies Fund (BCSAX)	JT	\$1 - \$1,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Columbia Small Cap Index (NMSAX)	SP	\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Charles Schwab SEP IRA ⇒ First Eagle Global Fund (SGENX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ FMI International Fund (FMIJX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Gateway Fund (GATEX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Harbor Midcap Value (HIMVX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Janus Henderson Short (JASBX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ JP Morgan Equity Income (OIEIX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Lazard Intl Small Cap (LZSMX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Madison Mid Cap Fund (GTSGX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ MFS Global Realstate Fund (MGLAX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Neuberger Berman Genesis (NBGNX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Nicholas Fund (NICSX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Oakmark Fund (OAKMX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Parametric Emerging Markets (EAEMX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Parnassus Midcap Fund (PARMX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒	JT	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TCW Emerging Markets Income Fund (TGINX)					
Charles Schwab SEP IRA ⇒ Templeton Global (TGTRX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Van Eck Emerging Markets Fund (GBFAX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP IRA ⇒ Virtus Seix Core BD (STIGX)	JT	\$1,001 - \$15,000	Tax-Deferred		
Circle S Inc	JT	\$1,000,001 - \$5,000,000	Salary	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: San Diego, CA, US DESCRIPTION: The company operates markets, fuel docks and various sports fishing related interest.					
Finn Mccool Linq, LLC, 1% Interest	JT	\$15,001 - \$50,000	partial ownership income	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Rancho Santa Fe, CA, US DESCRIPTION: A California LLC in the restaurant industry.					

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

### SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Bell Phillip TV Productions Inc	Acting Salary	\$111,331.50	N/A
Circle S Inc.	Salary	\$46,000.00	\$20,000.00
Circle S Inc.	Spouse's Salary	\$13,846.00	\$22,000.00
Action Beach Inc	Salary	\$46,000.00	\$80,000.00
Action Beach Inc	Spouse's Salary	\$ .00	\$22,000.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	US Bank	June 2011	Home Equity Line of Credit	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
President	Circle S Inc
Vice President	Action Beach Inc

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Charles Schwab SEP IRA (Owner: JT)  
DESCRIPTION: Kimberlin Brown Pelzer's primary account
- Charles Schwab SEP IRA (Owner: SP)  
DESCRIPTION: Gary Pelzer's account.

## 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:** Kimberlin Brown Pelzer , 01/9/2018