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Financial Disclosure Report

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Filer Information

Name: Brian Ewert
Status: Congressional Candidate
State/District: WI07

Filing Information

Filing Type: Candidate Report
Filing Year: 2018
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Period Covered: 01/01/2017– 02/28/2018

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameritas - Tax Sheltered Annuity ⇒ Calvert VP S&P 500 Index		$15,001 - $50,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ Calvert VP S&P MidCap 400 Index Portfolio, Class I		$1,001 - $15,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ Calvert VP SRI Balanced Portfolio, Class I		$1,001 - $15,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ Calvert VP Volatility Managed Moderate Portfolio		$1,001 - $15,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ Fidelity® VIP Contrafund® Portfolio, Service Class 2		$1,001 - $15,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ Fidelity® VIP Equity-Income Portfolio, Service Class 2		$1,001 - $15,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ MFS® Research International Portfolio, Initial Class		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameritas - Tax Sheltered Annuity ⇒ MFS® Strategic Income Portfolio, Initial Class		$1,001 - $15,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ Morgan Stanley VIF Emerging Markets Equity Portfolio, Class I		$1,001 - $15,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ Neuberger Berman AMT Mid Cap Intrinsic Value Portfolio, Class I		$1,001 - $15,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ PIMCO Total Return Portfolio, Administrative Class		$1,001 - $15,000	Tax-Deferred		
Ameritas - Tax Sheltered Annuity ⇒ PIMCO VIT Low Duration Portfolio, Administrative Class		$1,001 - $15,000	Tax-Deferred		
Associated Bank ⇒ Checking Account ⇒ Associated Checking		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Associated Bank ⇒ Misc Accounts ⇒ Associated Bank		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Associated Bank ⇒ Money Market ⇒ Associated Bank Money Market		$50,001 - $100,000	Interest	$1 - $200	$1 - $200
LPL - 403(b) ⇒ American Funds American Mutual Fund® Class F-2		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ American Funds The Growth Fund of America® Class F-2		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ Artisan Mid Cap Advisor		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ Calvert Emerging Markets Equity I		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ Eaton Vance Floating-Rate Advantage Fund Class I		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JPMorgan Mid Cap Value Fund Class I					
LPL - 403(b) ⇒ JPMorgan Mortgage-Backed Securities Fund Class I		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ LAKE FOREST BANK & TRUST CO N DESCRIPTION: Cash Account		$1 - $1,000	Tax-Deferred		
LPL - 403(b) ⇒ MFS® Research Fund Class I		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ Pax Global Environmental Markets Fund Institutional Class		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ Payden Low Duration Fund		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ PIMCO Income Fund Class P		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ PIMCO Real Return Fund Class P		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ PRIMECAP Odyssey Stock Fund		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ PRIMECAP Odyssey Stock Fund		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ Prudential Total Return Bond Fund Class Z		$1,001 - $15,000	Tax-Deferred		
LPL - 403(b) ⇒ UBS ETRACS Alerian MLP Infrastructure Index ETN		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ American Funds American Mutual Fund® Class F-2		$15,001 - $50,000	Tax-Deferred		
LPL - IRA ⇒ Calvert Emerging Markets Equity I		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Eaton Vance Floating-Rate Advantage Fund Class I					
LPL - IRA ⇒ First Eagle Global Fund Class I		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ Ishares Russell Tp 200 Grwth Inx Fund		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ JPMorgan Mid Cap Value Fund Class I		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ LAKE FOREST BANK & TRUST CO N DESCRIPTION: Cash		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ Lord Abbett Short Duration Income Fund Class F		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ MFS® Research Fund Class I		$15,001 - $50,000	Tax-Deferred		
LPL - IRA ⇒ MFS® Value Fund Class I		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ Nuveen Small Cap Value Fund Class I		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ oldman Sachs Small Cap Growth Insights Fund Investor Class		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ Pax Global Environmental Markets Fund Institutional Class		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ Payden Low Duration Fund		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ PIMCO Income Fund Class P		$15,001 - $50,000	Tax-Deferred		
LPL - IRA ⇒ PIMCO Real Return Fund Class P		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LPL - IRA ⇒ PMorgan Mortgage-Backed Securities Fund Class I		$1,001 - $15,000	Tax-Deferred		
LPL - IRA ⇒ Vanguard Inflation-Protected Securities Fund Admiral Shares		$1,001 - $15,000	Tax-Deferred		
LPL - Taxable ⇒ Alger Capital Appreciation Institutional Fund Class Z-2		$15,001 - $50,000	Capital Gains, Dividends	None	$1,001 - $2,500
LPL - Taxable ⇒ American Express Centurion - Cash DESCRIPTION: Cash		$15,001 - $50,000	Interest	$1 - $200	$1 - $200
LPL - Taxable ⇒ American Funds American Mutual Fund® Class F-2		$15,001 - $50,000	Capital Gains, Dividends	None	$1,001 - $2,500
LPL - Taxable ⇒ Artisan Mid Cap Fund		$1,001 - $15,000	Capital Gains	None	$1,001 - $2,500
LPL - Taxable ⇒ Baron Asset Fund Institutional Class		$1,001 - $15,000	Capital Gains	None	$201 - $1,000
LPL - Taxable ⇒ BBH Core Select Fund Class N		$15,001 - $50,000	Capital Gains, Dividends	None	$2,501 - $5,000
LPL - Taxable ⇒ Calvert Emerging Markets Equity Fund Class I		$15,001 - $50,000	None		
LPL - Taxable ⇒ DoubleLine Total Return Bond Fund Class N		$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
LPL - Taxable ⇒ Eaton Vance Floating-Rate Advantage Fund Class I		$50,001 - $100,000	Dividends	$201 - $1,000	$1,001 - $2,500
LPL - Taxable ⇒ Fidelity Advisor® New Insights Fund Class I		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$201 - $1,000
LPL - Taxable ⇒ First Eagle Global Fund Class I		$1,001 - $15,000	Capital Gains, Dividends	None	$201 - $1,000
LPL - Taxable ⇒ John Hancock Funds Disciplined Value Mid Cap Fund Class I		$15,001 - $50,000	Capital Gains, Dividends	None	$1,001 - $2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LPL - Taxable ⇒ JPMorgan Mortgage-Backed Securities Fund Class I		$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
LPL - Taxable ⇒ Lord Abbett Short Duration Income Fund Class F		$15,001 - $50,000	Dividends	$1 - $200	None
LPL - Taxable ⇒ MFS® Research Fund Class I		$15,001 - $50,000	Capital Gains, Dividends	None	$2,501 - $5,000
LPL - Taxable ⇒ MFS® Value Fund Class I		$15,001 - $50,000	Capital Gains, Dividends	None	$1,001 - $2,500
LPL - Taxable ⇒ Pax Small Cap Fund Institutional Class		$1,001 - $15,000	None		
LPL - Taxable ⇒ Payden Low Duration Fund		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
LPL - Taxable ⇒ PIMCO Income Fund Class P		$15,001 - $50,000	Dividends	$201 - $1,000	$1,001 - $2,500
LPL - Taxable ⇒ PRIMECAP Odyssey Stock Fund		$15,001 - $50,000	Capital Gains, Dividends	None	$201 - $1,000
LPL - Taxable ⇒ Prudential Total Return Bond Fund Class Z		$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
LPL - Taxable ⇒ T. Rowe Price Capital Appreciation Fund		$1,001 - $15,000	Capital Gains, Dividends	None	$201 - $1,000
LPL - Taxable ⇒ T. Rowe Price Growth Stock Fund		$15,001 - $50,000	Capital Gains, Dividends	None	$1,001 - $2,500
Marshfield Clinic 401k ⇒ ARTISAN INTERNATL INVESTOR CLASS		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ COLUMBIA CONTRARIAN CORE FUND CL A		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ DOUBLELINE LOW DURATION CL N		$1,001 - $15,000	Tax-Deferred		
Marshfield Clinic 401k ⇒		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
FEDERATED HIGH YIELD TRUST SS					
Marshfield Clinic 401k ⇒ FIDELITY CONTRAFUND		$50,001 - $100,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ FIDELITY GOVERNMENT CASH RESERVES		$1,001 - $15,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ FIDELITY MORTGAGE SECURITIES		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ Fidelity® Large Cap Value Enhanced Index Fund		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ ISHARES MSCI EMERGING MARKETS ETF		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ LAZARD INTL VALUE		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ OAKMARK FUND INVESTOR CLASS		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ PIMCO INCOME FUND CL D		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ PIMCO TOTAL RETURN CLASS D		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ Vanguard Balanced Index		$250,001 - $500,000	Tax-Deferred		
Marshfield Clinic 401k ⇒ Vanguard Total Bond Market Idx InstlPls		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ AllianzGI NFJ Small-Cap Value Fund Administrative Class		$1,001 - $15,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ AMG Managers Loomis Sayles Bond Fund Class N		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Artisan Mid Cap Fund Investor Class		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Marshfield Clinic 457b ⇒ Fidelity® Contrafund® - Class K		$50,001 - $100,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Fidelity® GNMA Fund		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Fidelity® Inflation-Protected Bond Fund		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Fidelity® Mortgage Securities Fund		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Fidelity® Small Cap Discovery Fund		$1,001 - $15,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Fidelity® Small Cap Growth Fund		$1,001 - $15,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Fidelity® Value Fund - Class K		$1,001 - $15,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Fidelity® Value Strategies Fund - Class K		$1,001 - $15,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Oakmark Fund Investor Class		$50,001 - $100,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ PIMCO Low Duration Fund Administrative Class		$1,001 - $15,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Templeton Developing Markets Trust Class A		$1,001 - $15,000	Tax-Deferred		
Marshfield Clinic 457b ⇒ Western Asset Core Bond Fund Class FI		$15,001 - $50,000	Tax-Deferred		
Marshfield Clinic Retirement Account ⇒ Core Plus Fixed Income Fund DESCRIPTION: Fund managed by the Marshfield Clinic Retirement Board of Trustees		$100,001 - $250,000	Tax-Deferred		
Marshfield Clinic Retirement Account ⇒ Marshfield Clinic General Fund DESCRIPTION: Fund managed by Marshfield Clinic Retirement Board of Trustees		$500,001 - $1,000,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Marshfield Clinic Retirement Account ⇒ Vanguard Balanced Index		$500,001 - $1,000,000	Tax-Deferred		
MONY ⇒ All Asset Growth-Alt 20		$1,001 - $15,000	Tax-Deferred		
Nationwide Variable ⇒ NVIT LARGE CAP GROWTH FUND - CLASS I		$15,001 - $50,000	Tax-Deferred		
Nationwide Variable ⇒ NVIT MULTI MANAGER MID CAP GROWTH FUND CLASS I International Stocks		$15,001 - $50,000	Tax-Deferred		
Nationwide Variable ⇒ NVIT MULTI-MANAGER INTERNATIONAL VALUE FUND - CLASS I		$1,001 - $15,000	Tax-Deferred		
Nationwide Variable ⇒ VANECK EMERGING MARKETS FUND		$15,001 - $50,000	Tax-Deferred		
Nationwide Variable ⇒ VANECK GLOBAL HARD ASSETS FUND		$1,001 - $15,000	Tax-Deferred		
Nationwide Whole Life ⇒ Nationwide Whole Life		$1,001 - $15,000	None		
Parnassus ⇒ Parnassus Fund		$1,001 - $15,000	Capital Gains, Dividends	None	$1,001 - $2,500
Parnassus SEP-IRA ⇒ Parnassus Fund		$50,001 - $100,000	Capital Gains, Dividends	None	$2,501 - $5,000
Touchstone Investment ⇒ SUSTAINABILITY AND IMPACT EQUITY FD-CL A		$1,001 - $15,000	Capital Gains, Dividends	None	$1,001 - $2,500

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

Schedule C: Earned Income

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Marshfield Clinic	Employment	$370,368.00	$307,313.00

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

Position	Name of Organization
Employee	Marshfield Clinic
Director	Marshfield Clinic Heritage Foundation

Schedule F: Agreements

None disclosed.

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

None disclosed.

Schedule A Asset Class Details

- Ameritas - Tax Sheltered Annuity
- Associated Bank
  Location: US
- Associated Bank ⇒ Checking Account
  Location: US
- Associated Bank ⇒ Misc Accounts
  Location: US
- Associated Bank ⇒ Money Market
  Location: US
- LPL - 403(b)
- LPL - IRA
- LPL - Taxable
  Location: US
- Marshfield Clinic 401k
- Marshfield Clinic 457b
- Marshfield Clinic Retirement Account
- MONY
- Nationwide Variable
- Nationwide Whole Life
  Location: US
- Parnassus
- Parnassus SEP-IRA
- Touchstone Investment

Location: US

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: Brian Ewert , 03/12/2018