Filing ID #10020158

Financial Disclosure Report

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Filer Information

Name: David Wertime
Status: Congressional Candidate
State/District: PA05

Filing Information

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 04/13/2018

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BIL SPDR Series Trust SPDR Bloomberg ETF	SP	$1,001 - $15,000	Dividends, Interest	$1 - $200	$1 - $200
Citibank Interest Checking		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Citibank Savings Plus Account		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
DELOITTE 401(K) PLAN ⇒ Vanguard Target Retirement 2050 Trust Select	SP	$15,001 - $50,000	Tax-Deferred		
DELOITTE 401(K) PLAN ⇒ Vanguard Target Retirement 2055 Trust Select	SP	$100,001 - $250,000	Tax-Deferred		
FIDELITY CRAVATH SR ATTORNEYS ⇒ FID EXT MKT IDX PR (FSEVX)		$15,001 - $50,000	Tax-Deferred		
FIDELITY CRAVATH SR ATTORNEYS ⇒ OAKMARK INTL INST (OANIX)		$15,001 - $50,000	Tax-Deferred		
FIDELITY CRAVATH SR ATTORNEYS ⇒ OPPHMR INTL GROWTH I (OIGIX)		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
FIDELITY CRAVATH SR ATTORNEYS ⇒ VANGUARD INST INDEX (VINIX)		$15,001 - $50,000	Tax-Deferred		
FIDELITY MILBANK SAVINGS PLAN ⇒ AF EUROPAC GROWTH R6 (RERGX)		$1,001 - $15,000	Tax-Deferred		
FIDELITY MILBANK SAVINGS PLAN ⇒ FID CAP APPREC K (FCAKX)		$15,001 - $50,000	Tax-Deferred		
FIDELITY MILBANK SAVINGS PLAN ⇒ FID SMALL CAP STOCK (FSLCX)		$1,001 - $15,000	Tax-Deferred		
FIDELITY MILBANK SAVINGS PLAN ⇒ VANGUARD INST INDEX (VINIX)		$15,001 - $50,000	Tax-Deferred		
Fidelity Roth IRA ⇒ FIDELITY GOVERNMENT CASH RESERVES (FDRXX)	SP	$15,001 - $50,000	Tax-Deferred		
THE SAVINGS PLAN FOR GRAHAM HOLDINGS COMPANY ⇒ Berkshire Hathaway Stock Fund		$15,001 - $50,000	Tax-Deferred		
THE SAVINGS PLAN FOR GRAHAM HOLDINGS COMPANY ⇒ Vanguard Target Retirement 2055 Fund (VFFVX)		$15,001 - $50,000	Tax-Deferred		
Vanguard Brokerage Account (Non-Retirement) ⇒ Vanguard 500 Index Fund Admiral Shares (VFIAX)		$50,001 - $100,000	Dividends	$201 - $1,000	$1,001 - $2,500
Vanguard Brokerage Account (Non-Retirement) ⇒ Vanguard European Stock Index Fund Admiral Shares (VEUSX)		$15,001 - $50,000	Dividends	None	$201 - $1,000
Vanguard Brokerage Account (Non-Retirement) ⇒ Vanguard Long-Term Investment-Grade Fund Admiral Shares (VWETX)		$50,001 - $100,000	Capital Gains, Dividends	$201 - $1,000	$2,501 - $5,000
Vanguard Brokerage Account (Non-Retirement) ⇒ Vanguard Short-Term Treasury Fund Admiral Shares (VFIRX)		$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Vanguard IRA ⇒ Vanguard Target Retirement 2050 Fund (VFIFX)		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard IRA ⇒ Vanguard Target Retirement 2055 Fund (VFFVX)		$15,001 - $50,000	Tax-Deferred		
VANGUARD ROLLOVER IRA BROKERAGE ACCT ⇒ Vanguard Federal Money Market Fund (IRA Rollover)		$15,001 - $50,000	Tax-Deferred		
VANGUARD ROLLOVER IRA BROKERAGE ACCT ⇒ Vanguard Small-Cap Index Fund Admiral Shares (VSMAX)		$50,001 - $100,000	Dividends	$201 - $1,000	$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
Lenfest Institute for Journalism	Contractor	N/A	$30,000.00
The Slate Group LLC	Salary	N/A	$60,547.00
Asia Society	article honorarium	N/A	$250.00
Deloitte Consulting	Spouse salary	N/A	N/A
Duco Experts	Consulting	N/A	$497.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Department of Education	July 2004	Student Loans: Direct Loan Stafford Subsidized & Unsubsidized	$15,001 - $50,000

Schedule E: Positions

Position	Name of Organization
Research Scholar	University of Pennsylvania Center for the Study of Contemporary China
Senior Fellow	Foreign Policy Research Institute

Schedule F: Agreements

Date	Parties To	Terms of Agreement
April 2017	Myself & The Slate Group LLC	401(k) program - continued participation in The Savings Plan for Graham Holdings Company
June 2011	Myself & Milbank, Tweed, Hadley & McCloy LLP	401(k) program - Continued participation in the Fidelity Milbank Savings Plan
February 2010	Myself & Cravath, Swaine & Moore LLP	401(k) plan - continued participation in the Fidelity Cravath Senior Attorneys plan

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

None disclosed.

Schedule A Asset Class Details

- DELOITTE 401(K) PLAN (Owner: SP)
- FIDELITY CRAVATH SR ATTORNEYS
- FIDELITY MILBANK SAVINGS PLAN
- Fidelity Roth IRA (Owner: SP)
- THE SAVINGS PLAN FOR GRAHAM HOLDINGS COMPANY
- Vanguard Brokerage Account (Non-Retirement)
  Location: US
- Vanguard IRA
- VANGUARD ROLLOVER IRA BROKERAGE ACCT

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: David Wertime , 04/13/2018