Filing ID #10021869

Financial Disclosure Report

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Filer Information

Name: Paul Pelletier
Status: Congressional Candidate
State/District: VA10

Filing Information

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/15/2018

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Express Personal Savings-Paul [BA]	JT	$50,001 - $100,000	Interest	$201 - $1,000	$201 - $1,000
Citibank Checking [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200
Citibank Checking [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200
IRA - Fidelity ⇒ Blended Fund Investments [MF]	JT	$50,001 - $100,000	Tax-Deferred		
IRA - Fidelity ⇒ DFA US Small Cap [MF]	JT	$15,001 - $50,000	Tax-Deferred		
IRA - Fidelity ⇒ FID 500 MKT Index [MF]	JT	$50,001 - $100,000	Tax-Deferred		
IRA - Fidelity ⇒ FID EXT MKT Index [MF]	JT	$15,001 - $50,000	Tax-Deferred		
IRA - Fidelity ⇒ MFS International [MF]	JT	$50,001 - $100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA - Fidelity ⇒ PIM LOW DUR Inst [MF]	JT	$15,001 - $50,000	Tax-Deferred		
IRA - Vanguard ⇒ Growth Index Fund [MF]	JT	$15,001 - $50,000	Tax-Deferred		
IRA - Vanguard ⇒ Mid Cap Index Fund [MF]	JT	$15,001 - $50,000	Tax-Deferred		
IRA - Vanguard ⇒ Small Cap Index Fund [MF]	JT	$1,001 - $15,000	Tax-Deferred		
IRA - Vanguard ⇒ Total International Stock [MF]	JT	$1,001 - $15,000	Tax-Deferred		
IRA - Vanguard ⇒ Windsor II Fund [MF]	JT	$1,001 - $15,000	Tax-Deferred		
Jacques' College Plan [5P] LOCATION: VA	JT	$50,001 - $100,000	Tax-Deferred		
Jeanne-Marie College Plan [5P] LOCATION: VA	JT	$50,001 - $100,000	Tax-Deferred		
Justice Federal Credit Union [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Massachusettes House [RP] LOCATION: Edgartwon, MA, US	JT	$500,001 - $1,000,000	Rent	None	$15,001 - $50,000
Miami Federal Credit Union [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Retirement Accounts ⇒ IRA Northwest Mutual ⇒ Commodities [MF]		$15,001 - $50,000	Tax-Deferred		
Retirement Accounts ⇒ IRA Northwest Mutual ⇒ Fixed Income [MF]		$50,001 - $100,000	Tax-Deferred		
Retirement Accounts ⇒ IRA Northwest Mutual ⇒		$100,001 - $250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
International Developed Markets [MF]					
Retirement Accounts ⇒ IRA Northwest Mutual ⇒ International Emerging Markets [MF]		$15,001 - $50,000	Tax-Deferred		
Retirement Accounts ⇒ IRA Northwest Mutual ⇒ Real Estate Securities [MF]		$15,001 - $50,000	Tax-Deferred		
Retirement Accounts ⇒ IRA Northwest Mutual ⇒ US Equity - Large Cap [MF]		$100,001 - $250,000	Tax-Deferred		
Retirement Accounts ⇒ IRA Northwest Mutual ⇒ US Equity - Mid Cap [MF]		$50,001 - $100,000	Tax-Deferred		
Retirement Accounts ⇒ IRA Northwest Mutual ⇒ US Equity Small Cap [MF]		$15,001 - $50,000	Tax-Deferred		

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit https://fd.house.gov/reference/asset-type-codes.aspx.

Schedule C: Earned Income

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Citimortgage	December 2014	Home Mortgage	$500,001 - $1,000,000
JT	Citimortgage	August 2017	Mortgage 2nd Home	$500,001 - $1,000,000
JT	Citimortgage	November 2012	Mortgage 2nd Home	$100,001 - $250,000
JT	Citimortgage	September 2005	HELOC	$250,001 - $500,000
JT	American Express	2016	Credit Card	$15,001 - $50,000
JT	Mastercard	2017	Credit Card	$15,001 - $50,000

Schedule E: Positions

None disclosed.

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
Client (Pueblo,, CO, US)	Legal Services

Schedule A Asset Class Details

- IRA - Fidelity (Owner: JT)
- IRA - Vanguard (Owner: JT)
- Retirement Accounts
- Retirement Accounts ⇒ IRA Northwest Mutual

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: Paul Pelletier , 05/15/2018