



Filing ID #10038427

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Max Rose
Status: Congressional Candidate
State/District: NY11

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2018
Filing Date: 08/14/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank Account - TD Bank [BA]	SP	\$250,001 - \$500,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Bank Account - USAA Checking Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	None
Fidelity - Roth IRA ⇒ Fidelity Zero Total Market Index [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Leigh Byrne, 100% Interest, 100% Interest [OL] LOCATION: Staten Island, NY, US DESCRIPTION: Freelance fashion consultant	SP	\$100,001 - \$250,000	None		
Rental Property [RP] LOCATION: Hoboken, NJ, US	SP	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$5,001 - \$15,000
TD Ameritrade Brokerage ⇒ ISHARES CORE S&P MID CAP ETF (IJH) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TD Ameritrade Brokerage ⇒ ISHARES CORE S&P SM CAP ETF (IJR) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TD Ameritrade Brokerage ⇒ ISHARES INC CORE MSCI ETF (IEMG) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TD Ameritrade Brokerage ⇒ iShares JPMorgan (EMB) [EF]		\$1,001 - \$15,000	None		
TD Ameritrade Brokerage ⇒ iShares Trust Core MSCI (IEFA) [EF]		\$1,001 - \$15,000	None		
TD Ameritrade Brokerage ⇒ iShares Trust Core US AGG BD (AGG) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TD Ameritrade Brokerage ⇒ iShares Trust IBOX HI YD (HYG) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TD Ameritrade Brokerage ⇒ iShares Trust S&P 500 Growth (IVW) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
TD Ameritrade Brokerage ⇒ iShares Trust S&P 500 Value (IVE) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
TD Ameritrade Brokerage ⇒ iShares Trust Tips BD (TIP) [EF]		\$1,001 - \$15,000	None		
TD Ameritrade Brokerage ⇒ TD Ameritrade - Cash [BA]		\$1,001 - \$15,000	None		
TD Ameritrade Brokerage ⇒ Vanguard Long Term Bond (BLV) [EF]		\$1,001 - \$15,000	None		
TD Ameritrade Brokerage ⇒ Vanguard Real Estate Index ETF (VNQ) [EF]		\$1,001 - \$15,000	None		
TD Ameritrade Brokerage ⇒ Vanguard Short Term Bond (BSV) [EF]		\$1,001 - \$15,000	None		

* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Brightpoint Health	Salary and Bonus	\$5,000.00	\$142,070.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Chase	November 2014	Mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Chief Of Staff	Brightpoint Health

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Fidelity - Roth IRA (Owner: SP) - TD Ameritrade Brokerage LOCATION: US
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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

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☒ 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: Hon. Max Rose , 08/14/2020