



Filing ID #10025358

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Phillip Ray Shepard
Status: Congressional Candidate
State/District: NC03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 03/19/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
First Bank - Savings [BA] DESCRIPTION: Interest bearing savings	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
State Employee's Credit Union-Accounts [BA] DESCRIPTION: Checking no interest & Interest bearing savings	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo Bank - Checking [BA] DESCRIPTION: checking not interest bearing	JT	\$1,001 - \$15,000	None		
Wells Fargo Securities-Annuity [FN] DESCRIPTION: for retirement	JT	\$15,001 - \$50,000	Tax-Deferred		

* 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
AXA Equitable Retirement Services Solutions	Spouse pension	\$4,017.00	\$4,017.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

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: Phillip Ray Shepard , 03/19/2019