



Filing ID #10028014

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Kathleen Williams
Status: Congressional Candidate
State/District: MToo

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 05/15/2019
Period Covered: 01/01/2018– 04/30/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds ⇒ AMCAP Fund-A [IH]		\$15,001 - \$50,000	Tax-Deferred		
American Funds [IH]		\$15,001 - \$50,000	None		
COMMENTS: asset is gaining in value, but no dividends are paid					
American Funds ⇒ Capital World Growth and Income Fund-A [IH]		\$1,001 - \$15,000	Tax-Deferred		
American Funds ⇒ Washington Mutual Investors Fund-A [IH]		\$15,001 - \$50,000	Tax-Deferred		
Hartford Funds ⇒ Capital Appreciation [MF]		\$1,001 - \$15,000	None		
Hartford Funds ⇒ Dividend and Growth [MF]		\$1,001 - \$15,000	None		
Hartford Funds ⇒ equity and growth [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Hartford Funds ⇒ Hartford Balanced [FN]		\$1,001 - \$15,000	None		
COMMENTS: these earn, but I am not taking dividends					
Hartford Funds ⇒ Hartford International Opportunities [MF]		\$1,001 - \$15,000	None		
Hartford Funds ⇒ VT Intl Value [MF]		\$1,001 - \$15,000	None		
Jetway Geographer LLC, 100% Interest [OL]		\$1 - \$1,000	sales	None	None
LOCATION: Bozeman/Gallatin, MT, US DESCRIPTION: Books are for sale, but not being actively marketed.					
Kathleen Savings [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
COMMENTS: Cash in bank					
Tom's Former Checking/Savings [BA]		\$15,001 - \$50,000	Interest	None	\$1 - \$200
WV O&G interests [RP]		\$1 - \$1,000	None		
LOCATION: Upshur County, WV, US DESCRIPTION: shares in (unproductive!) oil and gas wells; passed down through Tom's family					

* 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
Western Landowners Alliance	employment	N/A	\$3,308.80
COMMENTS: I ended employment at the end of February 2018, to work full-time on the 2018 campaign.			
Williams for Montana	employment	N/A	\$14,600.00
COMMENTS: This campaign ended in November 2018.			
Kathleen Williams for Montana	employment	\$1,350.00	N/A
COMMENTS: This is a new (2020) campaign.			

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.

SCHEDULE A ASSET CLASS DETAILS

- American Funds
- Hartford Funds

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

COMMENTS

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: Kathleen Williams , 05/15/2019