Filing ID #10029319

Financial Disclosure Report

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

Filer Information

Name: Jennifer Pilchick Perelman
Status: Congressional Candidate
State/District: FL23

Filing Information

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 09/5/2019

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab Brokerage account [OT] Description: schwab brokerage account	JT	$1,001 - $15,000	Dividends	$201 - $1,000	None
Charles Schwab Money Markey [BA]	JT	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
College Foundation of North Carolina ⇒ College Foundation of North Carolina [5P] Location: NC	DC	None	None		
College Foundation of North Carolina ⇒ Moderate Track ⇒ Moderate Track [5P] Location: NC	DC	$15,001 - $50,000	None		
College Foundation of North Carolina ⇒ Vanguard Conservative Growth Portfolio ⇒ Vanguard Conservative Growth Portfolio [5P] Location: NC	DC	$15,001 - $50,000	None		
Jason Perelman Trust [OT] Description: Gift Trust from Relative	SP	$15,001 - $50,000	Interest	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch Investment Account for DC2 ⇒ Eaton Vance Tax-adv [OT]	DC	$1,001 - $15,000	Dividends	None	Not Applicable
Description: loss					
Merrill Lynch Investment Account for DC2 ⇒ Investco QQQ TR [OT]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Description: Part of managed portfolio					
Merrill Lynch Investment Account for DC2 ⇒ ishares 1-3 yr treasure bond [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Ishares Core S&P500 [EF]	DC	$15,001 - $50,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Ishares floating rate bond ETF [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ ishares msci cda [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ ishares msci cda [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Ishares MSCI CDA ETF [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Ishares US Preferred [EF]	DC	$1,001 - $15,000	Dividends	None	Not Applicable
Description: loss					
Merrill Lynch Investment Account for DC2 ⇒ ishares US Preferred Stock ETF [EF]	DC	$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ ML Bank Deposit Program [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ powershares qqq trust SE [OT]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Description: part of portfolio					
Merrill Lynch Investment Account for DC2 ⇒ SPDR BLMBRG BRCLY [OT]	DC	$1,001 - $15,000	Dividends	None	Not Applicable
Description: Loss					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch Investment Account for DC2 ⇒ spdr blmbrg brcly high yield Bond ETF [EF]	DC	$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Vaneck Vectors Gold Miners ETF [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Vanguard Extended Duration [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Vanguard Real Estate ETF [EF]	DC	$1,001 - $15,000	Dividends	None	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Vanguard Real Estate ETF [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Vanguard Short Term Corporate Bond [CS] DESCRIPTION: Bond part of portfolio	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Lynch Investment Account for DC2 ⇒ Vanguard Total World Stock Index ETF (VT) [ST]	DC	$1,001 - $15,000	Capital Gains	$1,001 - $2,500	Not Applicable
Merrill Private Wealth Management DC1 ⇒ Eaton Vance Tax Adv [OT] DESCRIPTION: Part of Wealth Management fund	DC	$1 - $1,000	Dividends	None	Not Applicable
Merrill Private Wealth Management DC1 ⇒ Ishares MSCI CDA [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Private Wealth Management DC1 ⇒ Ishares US Preferred [OT] DESCRIPTION: I shares US preferred part pf Wealth Management Acct	DC	$1,001 - $15,000	Dividends	None	Not Applicable
Merrill Private Wealth Management DC1 ⇒ Powershares QQQ Trust SE [OT] DESCRIPTION: Part of Wealth Management fund	DC	$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Merrill Private Wealth Management DC1 ⇒ SPDR BLMBRG BRCLY High Yield Bond ETF [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Private Wealth Management DC1 ⇒ SPDR Bloomberg Barclays Aggregate Bond ETF (BNDS) [ST] DESCRIPTION: loss	DC	$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Private Wealth Management DC1 ⇒ SPDR Bloomberg Barclays Aggregate Bond ETF (BNDS) [ST] DESCRIPTION: loss	DC	$1,001 - $15,000	None		
Merrill Private Wealth Management DC1 ⇒ Vanguard Extended Duration Treasury ETF (EDV) [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Private Wealth Management DC1 ⇒ Vanguard Short-Term Bond ETF (BSV) [EF]	DC	$1,001 - $15,000	Dividends	None	Not Applicable
Merrill Private Wealth Management DC1 ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	DC	$1,001 - $15,000	Dividends	$1,001 - $2,500	Not Applicable
Merrill Private Wealth Management DC1 ⇒ iShares 1-3 year ⇒ ishares 1-3 year [EF]	DC	$1,001 - $15,000	Dividends	$1 - $200	Not Applicable
Merrill Private Wealth Management DC1 ⇒ iShares Core ⇒ Ishares Core S&P500 [EF]	DC	$5,000,001 - $25,000,000	Capital Gains	$1 - $200	Not Applicable
Merrill Private Wealth Management DC1 ⇒ ML Bank Deposit Program ⇒ ML Bank Deposit Program [BA]	DC	$1,001 - $15,000	None		
Merrill Private Wealth Management DC1 ⇒ Vanguard Real Estate ETF ⇒ Vanguard Real Estate [EF] DESCRIPTION: loss	DC	$1,001 - $15,000	Dividends	None	Not Applicable
Michigan Education Savings Program ⇒ Michigan Education Savings Program [5P] LOCATION: FL DESCRIPTION: DC1 529	DC	None	None		
Michigan Education Savings Program ⇒ Aggressive Age Based Option 17 ⇒ Aggressive Age Based Option [5P] LOCATION: MI	DC	$1,001 - $15,000	None		
Michigan Education Savings Program ⇒ Aggressive Age Based Option 18 ⇒ Aggressive Age Based Option 18 [5P] LOCATION: MI	DC	$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Michigan Education Savings Program ⇒ Balanced Option ⇒ Balanced Option [5P] LOCATION: FL	DC	$1,001 - $15,000	None		
Michigan Education Savings Program ⇒ Principal Plus Interest ⇒ Principal plus Interest Option [5P] LOCATION: MI	DC	$15,001 - $50,000	None		
Outpatient Surgical Services [PS] DESCRIPTION: Shares in a surgery center	JT	$100,001 - $250,000	Dividends	$15,001 - $50,000	$15,001 - $50,000
Precision Lithotripsy [OL] LOCATION: Broward County, FL, US DESCRIPTION: Shares in a Partnership for a surgical device	SP	$15,001 - $50,000	Dividends	$15,001 - $50,000	$5,001 - $15,000
Schwab IRA ⇒ AMG MANAGERS EMRG (MMCFX) [MF]		$1,001 - $15,000	Tax-Deferred		
Schwab IRA ⇒ Invesco Technology FTCHX [MF]		$1,001 - $15,000	Tax-Deferred		
Schwab IRA ⇒ Janus Henderson Enterprise JAENX [MF]		$1,001 - $15,000	Tax-Deferred		
Schwab IRA ⇒ Janus Henderson Forty JACTX [MF]		$1,001 - $15,000	Tax-Deferred		
Schwab IRA ⇒ Janus Henderson GLBL Life JAGLX [MF]		$1,001 - $15,000	Tax-Deferred		
Schwab IRA ⇒ Janus Henderson Growth JAGIX [MF]		$1,001 - $15,000	Tax-Deferred		
Walt Disney Company (DIS) [ST]	DC	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wells Fargo [BA]	JT	$15,001 - $50,000	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
21st Century Oncology	spouse salary	$368,471.00	$371,565.00
Vaughan Medical	spouse salary	$.00	$635.00
Medical Services	spouse Salary	$2,660.00	$3,482.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Navient	2000	Law school Loan	$15,001 - $50,000
SP	Bankers Healthcare Group	july 2016	Business loan	$100,001 - $250,000

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

- College Foundation of North Carolina (Owner: DC)
  Location: NC
  Description: DC2 529
- College Foundation of North Carolina ⇒ Moderate Track (Owner: DC)
  Location: NC
- College Foundation of North Carolina ⇒ Vanguard Conservative Growth Portfolio (Owner: DC)
  Location: NC
- Merrill Lynch Investment Account for DC2 (Owner: DC)
  Location: US
- Merrill Private Wealth Management DC1 (Owner: DC)
  Location: US
- Merrill Private Wealth Management DC1 ⇒ iShares 1-3 year (Owner: DC)
  Location: US
- Merrill Private Wealth Management DC1 ⇒ iShares Core (Owner: DC)

Location: US

- Merrill Private Wealth Management DC1 ⇒ ML Bank Deposit Program (Owner: DC)
  Location: US
- Merrill Private Wealth Management DC1 ⇒ Vanguard Real Estate ETF (Owner: DC)
  Location: US
- Michigan Education Savings Program (Owner: DC)
  Location: MI
- Michigan Education Savings Program ⇒ Aggressive Age Based Option 17 (Owner: DC)
  Location: MI
- Michigan Education Savings Program ⇒ Aggressive Age Based Option 18 (Owner: DC)
  Location: MI
- Michigan Education Savings Program ⇒ Balanced Option (Owner: DC)
  Location: MI
- Michigan Education Savings Program ⇒ Principal Plus Interest (Owner: DC)
  Location: MI
- Schwab IRA

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: Jennifer Pilchick Perelman , 09/5/2019