



Filing ID #10029767

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jake Auchincloss
Status: Congressional Candidate
State/District: MA04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 10/31/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
377 Commonwealth Ave [RP] LOCATION: Boston, MA, US		\$100,001 - \$250,000	None		
BofA [BA]	SP	\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Family home [RP] LOCATION: Chilmark, MA, US DESCRIPTION: Ownership of House		\$100,001 - \$250,000	None		
Fidelity cash [IH]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Primary Residence [RP] LOCATION: Newton, MA, US DESCRIPTION: Primary residence	JT	\$1,000,001 - \$5,000,000	None		
Target Date 2055 [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
USAA Checking & Savings [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
USAA Joint Checking & Saving [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
USAA Roth [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
USAA UATXX [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard -Bain [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
Vanguard EFT [EF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard EFT [EF]		\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000

* 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
Bain & Company Inc	Spouse Salary	\$299,000.00	\$205,832.00
Barkly Protects Inc	salary	N/A	\$8,096.00
City of Newton	Salary	\$9,500.00	\$8,872.00
Liberty Mutual Group Inc	Salary	\$170,500.00	\$119,719.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Metro Credit Union	2018	Mortgage primary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Product Manager	Barkly Protects

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: Jake Auchincloss , 10/31/2019