



Filing ID #10031038

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2019
Filing Date: 07/29/2021
Period Covered: 01/01/2018– 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 DESCRIPTION: Ownership share in LLC holding building of condominiums		\$100,001 - \$250,000	None		
Bain 401k ⇒ Vanguard Target Retirement 2050 [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Bank of America Savings - MG [BA]	SP	\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Fidelity cash [IH]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Flipside Crypto Investor Holdings, LLC [OT] DESCRIPTION: Investment in blockchain/crypto LLC		\$1,001 - \$15,000	None		
Liberty Mutual 401k ⇒ Target Date 2055 [MF]		\$50,001 - \$100,000	Tax-Deferred		
Newton Retirement System [DB]		\$1,001 - \$15,000	Tax-Deferred		

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 Individual Account - JA ⇒ American Balanced Class C (BALCX) [MF]		None	Capital Gains	None	\$2,501 - \$5,000
USAA Individual Account - JA ⇒ American Capital World Growth & Inc C (CWGCX) [MF]		None	Capital Gains	None	\$5,001 - \$15,000
USAA Individual Account - JA ⇒ American EuroPacific Growth Class F1 (AEGFX) [MF]		None	Capital Gains	None	\$1,001 - \$2,500
USAA Individual Account - JA ⇒ American New Perspective Class F1 (NPFFX) [MF]		None	Capital Gains	None	\$5,001 - \$15,000
USAA Individual Account - JA ⇒ Eaton Vance Tax Managed Growth CL A (EXTGX) [MF]		None	Capital Gains	None	\$15,001 - \$50,000
USAA Individual Account - JA ⇒ Goldman Sachs Group, Inc. (GS) [ST]		None	Capital Gains	None	\$5,001 - \$15,000
USAA Individual Account - JA ⇒ Intel Corporation (INTC) [ST]		None	Capital Gains	None	\$1,001 - \$2,500
USAA Individual Account - JA ⇒ Invesco Exchange-Traded Fund II - Invesco S&P 500 (XRLV) [EF]		None	Capital Gains	None	\$15,001 - \$50,000
USAA Individual Account - JA ⇒ iShares MSCI Emerging Markets ETF (EEM) [EF]		None	Capital Gains	None	\$201 - \$1,000
USAA Individual Account - JA ⇒ Loomis Sayles Dividend Income Fund Class C (LSCCX) [MF]		None	Capital Gains	None	\$2,501 - \$5,000
USAA Individual Account - JA ⇒ Microsoft Corporation (MSFT) [ST]		None	Capital Gains	None	\$15,001 - \$50,000
USAA Individual Account - JA ⇒ ProLogis, Inc. (PLD) [ST]		None	Capital Gains	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
USAA Individual Account - JA ⇒ SPDR S&P 500 ETF (SPY) [EF]		None	Capital Gains	None	\$15,001 - \$50,000
USAA Individual Account - JA ⇒ T Rowe Price Real Estate Fund (TRREX) [MF]		None	Capital Gains	None	\$1,001 - \$2,500
USAA Individual Account - JA ⇒ TIAA-CREF Growth & Income Fund Retail (TIIRX) [MF]		None	Capital Gains	None	\$2,501 - \$5,000
USAA Individual Account - JA ⇒ USAA Science & Technology Retail (USSCX) [MF]		None	Capital Gains, Dividends	\$2,501 - \$5,000	\$201 - \$1,000
USAA Individual Account - JA ⇒ USAA Treasury Money Market (UATXX) [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
USAA Individual Account - JA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		None	Capital Gains	None	\$1,001 - \$2,500
USAA Individual Account - JA ⇒ Vanguard Sector Index FDS (VDE) [EF]		None	Capital Gains	None	\$2,501 - \$5,000
USAA Individual Account - JA ⇒ Vanguard Total Bond Market ETF (BND) [EF]		None	Dividends	None	\$1,001 - \$2,500
USAA Individual Account - JA ⇒ Vanguard Total International Bond Index ETF (BNDX) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
USAA Individual Account - JA ⇒ Vanguard Total International Stock Index ETF (VXUS) [EF]		None	Dividends	None	\$2,501 - \$5,000
USAA Individual Account - JA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
USAA Individual Account - JA ⇒ Vanguard Wellington Admiral (VWENX) [MF]		None	Capital Gains	None	\$15,001 - \$50,000
USAA Individual Account - MG ⇒ McDonald's Corporation (MCD) [ST]	SP	None	Capital Gains	None	\$1,001 - \$2,500
USAA Individual Account - MG ⇒	SP	None	Capital Gains	None	\$1,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Procter & Gamble Company (PG) [ST]					\$2,500
USAA Individual Account - MG ⇒ Select Sector SPDR TR Energy (XLE) [EF]	SP	None	Capital Gains	None	\$15,001 - \$50,000
USAA Individual Account - MG ⇒ SPDR S&P 500 ETF (SPY) [EF]	SP	None	Capital Gains	None	\$2,501 - \$5,000
USAA Individual Account - MG ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
USAA Individual Account - MG ⇒ Vanguard Total International Bond Index ETF (BNDX) [EF]	SP	\$1,001 - \$15,000	None		
USAA Individual Account - MG ⇒ Vanguard Total International Stock Index ETF (VXUS) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
USAA Individual Account - MG ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
USAA Joint Checking & Saving [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
USAA Roth IRA ⇒ Vanguard Total Bond Market Index Fund (BND) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
USAA Roth IRA ⇒ Vanguard Total International Bond Index ETF (BNDX) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
USAA Roth IRA ⇒ Vanguard Total International Stock Index ETF (VXUS) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
USAA Roth IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		

* 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
Bain & Company Inc	Spouse Salary	N/A	N/A
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

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

- Bain 401k (Owner: SP)
- Liberty Mutual 401k
- USAA Individual Account - JA
LOCATION: US
- USAA Individual Account - MG (Owner: SP)
LOCATION: US
- USAA Roth IRA (Owner: SP)

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: Hon. Jake Auchincloss , 07/29/2021