Filing ID #10032330

Financial Disclosure Report

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

Filer Information

Name: Deborah Ross
Status: Congressional Candidate
State/District: NC02

Filing Information

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 01/1/2020
Period Covered: 01/01/2018– 12/31/2019

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AMG Managers Special Equity (IRA) [MF]		$1,001 - $15,000	Tax-Deferred		
AMG Managers Special Equity (Roth) [MF]		$50,001 - $100,000	Tax-Deferred		
Columbia Acorn Fund [MF]		$50,001 - $100,000	Capital Gains, Dividends	$5,001 - $15,000	$5,001 - $15,000
Duke Retirement Plan ⇒ Vanguard Institutional Target 2030 Retirement Fund [MF]		$1,001 - $15,000	Tax-Deferred		
Fidelity Brokerage Account ⇒ Citigroup, Inc. (C) [ST]	JT	None	Dividends	None	$201 - $1,000
Fidelity Brokerage Account ⇒ Fidelity Money Market [BA]	JT	$15,001 - $50,000	Interest	$201 - $1,000	$1 - $200
Fidelity Brokerage Account ⇒ General Motors Company (GM) [ST]	JT	None	Dividends	None	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Fidelity IRA 1 ⇒ Fidelity Money Market [BA]	SP	$100,001 - $250,000	Tax-Deferred		
Fidelity IRA 1 ⇒ Intel Corporation (INTC) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity IRA 1 ⇒ Oracle Corporation (ORCL) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity IRA 1 ⇒ Pfizer, Inc. (PFE) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity IRA 2 ⇒ Fidelity Money Market [BA]	SP	$500,001 - $1,000,000	Tax-Deferred		
Fidelity IRA 2 ⇒ Gilead Sciences, Inc. (GILD) [ST]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ Ishares NASDAQ Biotechnology Fund [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ XLV Health Care Select Sector SPDR ETF [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Bristol-Myers Squibb Company (BMY) [ST]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Money Market [BA]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity Select Biotechnology Fund [MF]		$50,001 - $100,000	Capital Gains, Dividends	$5,001 - $15,000	$5,001 - $15,000
Fox Rothschild RSP ⇒ Vanguard Institutional Target 2030 Retirement Fund [MF]		$50,001 - $100,000	Tax-Deferred		
IAB Brokerage Account (IRA) ⇒ Money Market [BA]	SP	$100,001 - $250,000	Tax-Deferred		
Mountain Rental [RP]	SP	$250,001 -	Rent	$5,001 - $15,000	$5,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
		$500,000			$15,000
Location: Lansing, NC, US					
Primary Residence [RP]	JT	$500,001 - $1,000,000	Rent	$15,001 - $50,000	$15,001 - $50,000
Location: RALEIGH, NC, US					
RS Growth Fund Class A (IRA) [MF]		$15,001 - $50,000	Tax-Deferred		
State 401k ⇒ NC Fixed Income Fund [MF]		$1,001 - $15,000	Tax-Deferred		
State 401k ⇒ NC International Fund [MF]		$50,001 - $100,000	Tax-Deferred		
State 401k ⇒ NC Large Cap Core Fund [MF]		$100,001 - $250,000	Tax-Deferred		
State 401k ⇒ NC Large Cap Index Fund [MF]		$50,001 - $100,000	Tax-Deferred		
State 401k ⇒ NC Small Mid Cap Fund [MF]		$15,001 - $50,000	Tax-Deferred		
State 401k ⇒ NC Small Mid Cap Index Fund [MF]		$50,001 - $100,000	Tax-Deferred		
State Employees Credit Union Accounts [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$201 - $1,000
TTA 401a ⇒ Vantagepoint Growth R1 [MF]		$1,001 - $15,000	Tax-Deferred		
TTA 401a ⇒ Vantagepoint Plus Fund R1 [MF]		$1,001 - $15,000	Tax-Deferred		
TTA 401a ⇒ VT Clearbridge Intl Value [MF]		$1,001 - $15,000	Tax-Deferred		
TTA 457(b) ⇒ Fidelity OTC [MF]		$50,001 - $100,000	Tax-Deferred		
TTA 457(b) ⇒ Invesco Opp Global A [MF]		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TTA 457(b) ⇒ Nationwide MidCap Mkt Index A [MF]		$15,001 - $50,000	Tax-Deferred		
TTA 457(b) ⇒ Nationwide Small Cap Index A [MF]		$15,001 - $50,000	Tax-Deferred		
Unimproved Lot [RP] Location: Avon, NC, US	SP	$15,001 - $50,000	None		
Vacation Rental [RP] Location: Salvo, NC, US	JT	$500,001 - $1,000,000	Rent	$15,001 - $50,000	$15,001 - $50,000
Vanguard 500 Index Fund Admiral (IRA) [MF]		$50,001 - $100,000	Tax-Deferred		
Vanguard Growth Index Fund Admiral (Roth) [MF]	SP	$50,001 - $100,000	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
Smith Moore Leatherwood LLP	Salary		$94,350.00
Fox Rothschild LLP	Salary	$123,561.00	$17,096.00
eServices LLC	Spouse's Salary	N/A	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo	October 2010	Mortgage-Raleigh	$100,001 - $250,000
	First National Bank	September 2012	Mortgage-Salvo	$100,001 - $250,000

Schedule E: Positions

Position	Name of Organization
Board Member	Brown Alumni Association
Advisory Board Member	Lightner Y Achievers

Schedule F: Agreements

Date	Parties To	Terms of Agreement
January 2003	Myself and state of North Carolina	Continued participation in employee benefit plan. Vested in legislative pension plan after 5 years of legislative service , serving from 2003 to 2013
January 2003	Myself and state of North Carolina	Continued participation in employee health plan, with lifetime medical benefits, upon attaining the age of 60.
September 1994	Myself and American Civil Liberties Union	Continued participation in employee pension plan, vesting after 7 years of service.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Asset Class Details

- Duke Retirement Plan
- Fidelity Brokerage Account (Owner: JT)
  Location: US
- Fidelity IRA 1 (Owner: SP)
- Fidelity IRA 2 (Owner: SP)
- Fidelity Roth IRA (Owner: SP)
- Fox Rothschild RSP
- IAB Brokerage Account (IRA) (Owner: SP)
- State 401k
- TTA 401a
- TTA 457(b)

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: Deborah Ross , 01/1/2020