



Filing ID #10044767

# FINANCIAL DISCLOSURE REPORT

---

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

---

## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2019  
**Filing Date:** 04/10/2022  
**Period Covered:** 01/01/2018– 10/31/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset                                                                                                                                | Owner | Value of Asset           | Income Type(s) | Income<br>Current Year to<br>Filing | Income<br>Preceding<br>Year |
|--------------------------------------------------------------------------------------------------------------------------------------|-------|--------------------------|----------------|-------------------------------------|-----------------------------|
| 377 Commonwealth Ave [RP]<br><br>LOCATION: Boston, MA, US<br>DESCRIPTION: Ownership share in LLC holding building of condominiums    |       | \$100,001 -<br>\$250,000 | None           |                                     |                             |
| Bain 401k ⇒<br>Vanguard Target Retirement 2050 [MF]                                                                                  | SP    | \$100,001 -<br>\$250,000 | Tax-Deferred   |                                     |                             |
| Bank of America Savings - MG [BA]                                                                                                    | SP    | \$50,001 -<br>\$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 ⇒<br>Flipside Crypto, Inc. [OT]<br><br>DESCRIPTION: Investment in software-as-service company |       | \$1,001 - \$15,000       | None           |                                     |                             |
| Liberty Mutual 401k ⇒<br>Target Date 2055 [MF]                                                                                       |       | \$50,001 -<br>\$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       |
| USAA Individual Account - JA ⇒                                                               |       | None               | Capital Gains  | None                          | \$15,001 -            |

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

| Asset                                                                                      | Owner | Value of Asset        | Income Type(s)           | Income Current Year to Filing | Income Preceding Year |
|--------------------------------------------------------------------------------------------|-------|-----------------------|--------------------------|-------------------------------|-----------------------|
| USAA Individual Account - MG ⇒<br>Select Sector SPDR TR Energy (XLE) [EF]                  | SP    | None                  | Capital Gains            | None                          | \$15,001 - \$50,000   |
| USAA Individual Account - MG ⇒<br>SPDR S&P 500 ETF (SPY) [EF]                              | SP    | None                  | Capital Gains            | None                          | \$2,501 - \$5,000     |
| USAA Individual Account - MG ⇒<br>Vanguard Total Bond Market ETF (BND) [EF]                | SP    | \$1,001 - \$15,000    | Dividends                | \$201 - \$1,000               | \$201 - \$1,000       |
| USAA Individual Account - MG ⇒<br>Vanguard Total International Bond Index ETF (BNDX) [EF]  | SP    | \$1,001 - \$15,000    | None                     |                               |                       |
| USAA Individual Account - MG ⇒<br>Vanguard Total International Stock Index ETF (VXUS) [EF] | SP    | \$15,001 - \$50,000   | Dividends                | \$201 - \$1,000               | \$201 - \$1,000       |
| USAA Individual Account - MG ⇒<br>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 ⇒<br>Vanguard Total Bond Market Index Fund (BND) [EF]                        | SP    | \$15,001 - \$50,000   | Tax-Deferred             |                               |                       |
| USAA Roth IRA ⇒<br>Vanguard Total International Bond Index ETF (BNDX) [EF]                 | SP    | \$15,001 - \$50,000   | Tax-Deferred             |                               |                       |
| USAA Roth IRA ⇒<br>Vanguard Total International Stock Index ETF (VXUS) [EF]                | SP    | \$50,001 - \$100,000  | Tax-Deferred             |                               |                       |
| USAA Roth IRA ⇒<br>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<br>Current Year to<br>Filing | Amount<br>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

|                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>Bain 401k (Owner: SP)</li><li>Flipside Crypto Investor Holdings, LLC<br/>LOCATION: US<br/>DESCRIPTION: Investment in software-as-a-service company</li><li>Liberty Mutual 401k</li><li>USAA Individual Account - JA<br/>LOCATION: US</li><li>USAA Individual Account - MG (Owner: SP)<br/>LOCATION: US</li><li>USAA Roth IRA (Owner: SP)</li></ul> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

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:** Hon. Jake Auchincloss , 04/10/2022