



Filing ID #10034811

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Luke Joshua Letlow
Status: Congressional Candidate
State/District: LA05

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 05/14/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
College Savings Plan [5P] LOCATION: LA	JT	\$1,001 - \$15,000	None		
JP Morgan Chase [BA] DESCRIPTION: Cash, Checking Account	JT	\$1,001 - \$15,000	None		
Land [RP] LOCATION: Start, Richland Parish, LA, US DESCRIPTION: Home site, acquired via donation from parents, Johnny Lynn and Kathryn Letlow. Date 7/24/15, Richland Parish, Conveyance Records Book 511, Page 635	JT	\$15,001 - \$50,000	None		
Merrill Lynch CMA [BA]	JT	\$15,001 - \$50,000	None		
Merrill Lynch CMA [BA]	JT	\$1,001 - \$15,000	None		
Personal Residence [RP] LOCATION: Start, Richland Parish, LA, US		\$250,001 - \$500,000	None		
QEP Resources, Inc. (QEP) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ LA State Employee Retirement [DB]		\$15,001 - \$50,000	None		
Retirement ⇒ LA State Employee Retirement [DB]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ Blackrock Equity Dividend [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ Clearbridge Large Cap [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ Delaware Small Cap [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ Edgewood Growth Fund [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ iShares Russell 1000 Growth ETF (IWF) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ iShares Russell 1000 Value ETF (IWD) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ MFS Value FD CL 1 [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ Neuberger Berman INTL Equity [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ Pimco Investment Grade [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ SPDR Bloomberg Barclays 1-3 Month T-Bill ETF (BIL) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ Merrill Lynch IRRA ⇒ TCW Total Return [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ Vanguard Intermediate-Term Bond ETF (BIV) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Merrill Lynch IRRA ⇒ Vanguard Mortgage-Backed Securities ETF (VMBS) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ Bank of America [BA]		\$1 - \$1,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ BHYIX BLACKROCK HI YLD BD PORTFOLIO INST CL [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ BSIIX BLACKROCK STRATEGIC INCOME OPPRTNTS PTF INST [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ MABAX BLACKROCK BASIC VALUE FUND INC INSTL [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ MADCX BLACKROCK EMERGING MARKETS FUND INSTL [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ MADVX BLACKROCK EQTY DIVIDEND FUND INSTL [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ MAFGX BLACKROCK CAPITAL APPRECIATION FD INC INST [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ MAFOX BLACKROCK LARGE CP FOCUS GROWTH FUND INC INSTL [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ MAGCX BLACKROCK ADVANTAGE GLOBAL FUND, INC. INSTL [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MAHQX BLACKROCK TOTAL RETURN FUND INSTITUTIONAL CLASS [MF]					
Retirement ⇒ Roth IRA Merrill Lynch ⇒ MAILX BLACKROCK INTERNATIONAL FD INSTL [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ MALOX BLACKROCK GLOBAL ALLOCATION FD INC INSTL [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Roth IRA Merrill Lynch ⇒ Plains All American Pipeline, L.P. (PAA) [ST]		\$1,001 - \$15,000	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
University of Louisiana Monroe	Spouse Salary	\$88,697.00	\$75,567.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Cross Keys Bank	March 2020	Home mortgage	\$250,001 - \$500,000
JT	Ryan Honda	2017	Care Note	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Chief of Staff	United States House of Representatives

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Retirement
- Retirement ⇒ Merrill Lynch IRRA
- Retirement ⇒ Roth IRA Merrill Lynch

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: Luke Joshua Letlow , 05/14/2020