



Filing ID #10035063

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Cliff Bentz
Status: Congressional Candidate
State/District: OR02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 05/4/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab SEP-IRA ⇒ Amgen Inc. (AMGN) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ Bed Bath & Beyond Inc. (BBBY) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ Cash Sweep [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ Federated MDST Large Cap [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ Home Depot, Inc. (HD) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ Intel Corporation (INTC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ Janus Henderson Research Fd [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Medtronic plc. Ordinary Shares (MDT) [ST]					
Charles Schwab SEP-IRA ⇒ Oracle Corporation (ORCL) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ Vanguard Mid Cap Index Fd [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab SEP-IRA ⇒ Versus Cap Multi Mngr [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Edward Jones IRA ⇒ Duke Energy Corporation (DUK) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Edward Jones IRA ⇒ Enbridge Inc (ENB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Money market [IH]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Edward Jones IRA ⇒ Occidental Petroleum Corporation (OXY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRA Rollover ⇒ DFA US Targeted Value - DFFVX [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA Rollover ⇒ DFA US Targeted Value - DFFVX [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA Rollover ⇒ Southern Company (SO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
K and A Family Limited Partnership ⇒ American Electric Power Company, Inc. (AEP) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
K and A Family Limited Partnership ⇒ American FD Europacific Gwth [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
K and A Family Limited Partnership ⇒ Charles Schwab Bank Sweep [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ Chevron Corporation (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
K and A Family Limited Partnership ⇒ Clorox Company (CLX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ DFA Emerging Mkts Core Equity [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ DFA Intl Small Co Port Instl [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ DFA US Targeted Value [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ McDonald's Corporation (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
K and A Family Limited Partnership ⇒ Pimco Incm Inst CL [MF]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Bond fund					
K and A Family Limited Partnership ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ The Kraft Heinz Company (KHC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ U.S. Bancorp (USB) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ UGI Corporation (UGI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
K and A Family Limited Partnership ⇒ Unilever NV (UN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
K and A Family Limited Partnership ⇒ Versus Cap Multi Mngr [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
K and A Family Limited Partnership ⇒ Welltower Inc [RE]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
K and A Family Limited Partnership - Money Market [OT]		\$1,001 - \$15,000	Dividends, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: 15.518% interest in Limited Partnership for the benefit of a family member. Detail of investments listed on Schedule A					
Moonriver LLC ⇒ 1st Ave, Ontario, OK [RP]		\$15,001 - \$50,000	Rent	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Ontario, OR, US DESCRIPTION: Mavis Building					
Moonriver LLC ⇒ 22 Acre Field, Ontario, OR [RP]		\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Ontario, OR, US					
Moonriver LLC ⇒ 2nd St., Ontario, OR [RP]		\$50,001 - \$100,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Ontario, OR, US DESCRIPTION: Stainless Steel Building					
Moonriver LLC ⇒ 2nd St., Ontario, OR [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Ontario, OR, US DESCRIPTION: Outdoorsman property					
Moonriver LLC ⇒ 2nd St.,Ontario, Oregon [RP]		\$50,001 - \$100,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Ontario, OR, US DESCRIPTION: Miller Building					
Moonriver LLC ⇒ 4th Ave. Ontario, OR [RP]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Ontario, OR, US DESCRIPTION: Custom Truck Building					
Ontario Animal Hospital [OL]	SP	\$250,001 - \$500,000	Business income	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
LOCATION: Ontario, OR, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Schedule C - salary reflected above					
Oregon Legislators Individual Account Retirement Program [PE]		\$15,001 - \$50,000	None		
RB2EH Enterprises [RP]		\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Ontario, OR, US DESCRIPTION: Building and parking lot - 25% ownership					
Rental home - Morgan Ave [RP]	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Ontario, OR, US					
The Bentz Farm ⇒ 42 acres, Morgan Ave, Ontario, OR [FA]		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Ontario, OR, US DESCRIPTION: Located in Ontario, OR					
The Bentz Farm ⇒ 71 acre farm - Ontario, Oregon [RP]		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Ontario, OR, US DESCRIPTION: Includes residence					
Yturri Rose Keough Plan ⇒ American FD Europacific Gwth Fd [MF]		\$100,001 - \$250,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ Charles Schwab Bank [BA]		\$1,001 - \$15,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ DFA Emerging Mkts Core Equity [MF]		\$100,001 - \$250,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ DFA Intl Small Co Port [MF]		\$50,001 - \$100,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ DFA US Large Cap Value Port [MF]		\$50,001 - \$100,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ DFA US Targeted Value Port [MF]		\$15,001 - \$50,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ Metropolitan West Total Return Bond [MF]		\$250,001 - \$500,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Yturri Rose Keough Plan ⇒ Pimco Incm Inst Cl [MF]		\$250,001 - \$500,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ Vanguard 500 Index FD [MF]		\$100,001 - \$250,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ Vanguard Growth Index FD [MF]		\$100,001 - \$250,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ Vanguard Mid Cap Index [MF]		\$15,001 - \$50,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ Vanguard Small Cap Index [MF]		\$100,001 - \$250,000	Tax-Deferred		
Yturri Rose Keough Plan ⇒ Versus Cap Multi Mngr [MF]		\$100,001 - \$250,000	Tax-Deferred		
Yturri, Rose, LLP Law Firm, 25% Interest [OL]		\$15,001 - \$50,000	See Schedule C	None	None
LOCATION: Ontario, OR, US					
DESCRIPTION: Schedule C shows salary					

* 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
State of Oregon	Legislator salary	\$31,614.00	\$31,614.00
Yturri Rose, LLP	Law firm salary	\$43,181.00	\$23,961.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Northwest Farm Credit Services, Spokane, WA	December 2019	Mortgage on 71 acres, Ontario, OR	\$250,001 - \$500,000
JT	Columbia Banking System, Tacoma, WA	February 2005	Mortgage on Ontario Animal Hospital	\$50,001 - \$100,000
	US Bank, Minneapolis, MN	March 2008	Mortgage - 2nd St., Ontario, OR	\$100,001 - \$250,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Ken Bentz, Ontario, OR	January 2006	Mortgage on Ontario, OR buildings	\$15,001 - \$50,000
	K and A Ltd., Ontario, OR	January 2006	Mortgages on Ontario, OR buildings	\$15,001 - \$50,000
	US Bank, Minneapolis, MN	March 2008	Mortgage - 4th Ave, Ontario, OR	\$50,001 - \$100,000
JT	Umpqua Bank, Oregon	January 2016	Mortgage on Morgan Ave., Ontario rental	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Partner	Yturri Rose LLP
Limited Partner	K and L Limited Partnership
Partner	RB2EH Enterprises

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2008	State of Oregon	Oregon Legislator Pension

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Charles Schwab SEP-IRA (Owner: SP) - Edward Jones IRA - IRA Rollover - K and A Family Limited Partnership LOCATION: Ontario, OR, US DESCRIPTION: 15.518% ownership - Moonriver LLC LOCATION: Ontario, OR, US - The Bentz Farm LOCATION: Ontario, OR, US - Yturri Rose Keough Plan

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: Cliff Bentz , 05/4/2020