



Filing ID #10035107

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Stephanie Schmid
Status: Congressional Candidate
State/District: NJ04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 04/22/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity - Center For Reproductive Rights 401(k) And Profit Sharing Plan ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity - Center For Reproductive Rights 401(k) And Profit Sharing Plan ⇒ Fidelity Small Cap Growth Fund (FCPGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
PNC Bank [BA] DESCRIPTION: Checking and Money Market account		\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
Wells Fargo - Brokerage # 1 ⇒ American Funds EuroPacific Growth Fund Class F-2 (AEPFX) [MF]		\$1,001 - \$15,000	None		
Wells Fargo - Brokerage # 1 ⇒ American Funds Washington Mutual Fd F2 (WMFFX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo - Brokerage # 1 ⇒ Baird Funds Inc. Aggregate Bd FD Instl Shares Class I (BAGIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo - Brokerage # 1 ⇒ Baron Invt Funds Trust Small Cap Fund Instl Shares Class I (BSFIX) [MF]		\$1,001 - \$15,000	None		
Wells Fargo - Brokerage # 1 ⇒ Dodge & Cox Funds Intl Stock Fund (DODFX) [MF]		\$1,001 - \$15,000	None		
Wells Fargo - Brokerage # 1 ⇒ Eaton Vance Ser II Income Fund Boston CL I (EIBIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo - Brokerage # 1 ⇒ Edgewood Funds Growth Fund Instl Class (EGFIX) [MF]		\$1,001 - \$15,000	None		
Wells Fargo - Brokerage # 1 ⇒ Harbor Fund Cap Appreciation Fd Instl CL (HACAX) [MF]		\$1,001 - \$15,000	None		
Wells Fargo - Brokerage # 1 ⇒ Lazard Emerging Markets Equity Portfolio Instl Cl (LZEMX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo - Brokerage # 1 ⇒ MFS Ser TR X Emerging Markets Debt Fd Class I (MEDIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo - Brokerage # 1 ⇒ MFS Value CL I (MEIIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo - Brokerage # 1 ⇒ T. Rowe Price Mid-Cap Growth Fund Inc (RPMGX) [MF]		\$1,001 - \$15,000	None		
Wells Fargo - Brokerage # 1 ⇒ T.Rowe Price Intl Fd Overseas Stk Fd (TROSX) [MF]		\$1,001 - \$15,000	None		
Wells Fargo - Brokerage # 1 ⇒ Victory Sycamore Small Co Opportunity Fund CL I (VSOIX) [MF]		\$1,001 - \$15,000	None		
Wells Fargo - Brokerage # 1 ⇒ Virtus Asset Tr Ceredex Mid Cap Value Equity Fund CL I (SMVTX) [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo - Brokerage # 1 ⇒ Virtus Vontobel Emerging Markets Opportunities Fund Class I (HIEMX) [MF]		\$1,001 - \$15,000	None		
Wells Fargo - Brokerage # 2 ⇒ Fidelity Investments Money Market Fds Instl (FNSXX) [BA]		\$1 - \$1,000	Dividends	None	\$201 - \$1,000
Wells Fargo - Brokerage # 2 ⇒ SmartTrust Argus Dividend Growers Total Return Trust Ser 21 [OT]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Unit investment trusts					
Wells Fargo - Brokerage # 2 ⇒ SmartTrust Technology Revolution Trust Ser 3 [OT]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Unit investment trusts					

* 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
Center for Reproductive Rights, Inc.	Salary	N/A	\$65,113.05

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	PNC Bank	January 2017	Home Equity Line of Credit on Washington, DC residential property	\$50,001 - \$100,000
COMMENTS: Paid in full June 2019				
	Wells Fargo Bank N.A.	October 2011	Mortgage on Washington, DC residential property	\$250,001 - \$500,000
COMMENTS: Paid in full June 2019				

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
July 2019	Filer and Center For Reproductive Rights	Continuing participation in a defined contribution plan managed by former employer. Employer no longer contributes to the plan.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- o Fidelity - Center For Reproductive Rights 401(k) And Profit Sharing Plan
- o Wells Fargo - Brokerage # 1
LOCATION: US
- o Wells Fargo - Brokerage # 2
LOCATION: US

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: Stephanie Schmid , 04/22/2020