



Filing ID #10035322

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jake Auchincloss
Status: Congressional Candidate
State/District: MA04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
377 Commonwealth Ave LLC [OL] LOCATION: Boston/Suffolk, MA, US DESCRIPTION: Ownership share in LLC holding building of condominiums		\$100,001 - \$250,000	Capital Gains	None	\$50,001 - \$100,000
529 DC1 ⇒ American balanced fund-529F1 [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
529 DC1 ⇒ Capital world growth and income-529F1 [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
529 DC1 ⇒ Fundamental investors-529F1 [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
529 DC1 ⇒ The New Economy Fund-529F1 [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
529 DC1 ⇒ Washington Mutual Investors Fund-529F1 [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bain 401k ⇒ Vanguard Target Retirement 2050 [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Bank of America Savings - MG [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family home, 19% Interest [RP] LOCATION: Chilmark, MA, US DESCRIPTION: Ownership of house		\$250,001 - \$500,000	None		
Flipside Crypto, 100% Interest [OT] DESCRIPTION: Investment in blockchain / crypto LLC		\$1,001 - \$15,000	Capital Gains	None	None
Geraldine Glimcher Excepted Trust [EQ]		Undetermined	Blind to trust holdings	None	\$15,001 - \$50,000
Liberty Mutual 401k ⇒ Target Date 2055 [MF]		None	Tax-Deferred		
Newton house [RP] LOCATION: Newton, MA, US	JT	\$1,000,001 - \$5,000,000	None		
Savings USAA TA [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ BlackRock Strategic Municipal Opportunity Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	None
SFP/MMLIS Individual Acct - JA ⇒ Calvert Flexible Bond [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ Calvert Responsible Muni Income [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	None
SFP/MMLIS Individual Acct - JA ⇒ Fidelity Government Cash Reserves [MF]		\$1,001 - \$15,000	Interest	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ First Trust Water [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ Hartford Municipal Opportunities [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SFP/MMLIS Individual Acct - JA ⇒ Hartford Schroders International Stock [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	None	None
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EAFE [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EM ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI USA Small Cap [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ iShares MSCI USA ESG SLC [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ JPMorgan Hedged Equity [MF]		None	Capital Gains, Dividends	\$201 - \$1,000	None
SFP/MMLIS Individual Acct - JA ⇒ JPMorgan High Yield Municipal Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	None
SFP/MMLIS Individual Acct - JA ⇒ JPMorgan Short-Intermediate Muni Bond [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	None
SFP/MMLIS Individual Acct - JA ⇒ SPDR MSCI Emerging Markets Fossil Fuel Free [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ SPDR S&P 500 Fossil Fuel Reserves Free [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - JA ⇒ Vanguard Total International Bond Index ETF [EF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
SFP/MMLIS Individual Acct - JA ⇒ Vanguard Total Stock Market ETF [EF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	\$1,001 - \$2,500
SFP/MMLIS Individual Acct - MG ⇒ BlackRock Strategic Municipal Opportunity Fund [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒	SP	\$1,001 - \$15,000	Capital Gains,	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Calvert Flexible Bond [MF]			Dividends		
SFP/MMLIS Individual Acct - MG ⇒ Calvert Responsible Muni Income [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒ Fidelity Government Cash Reserves [MF]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒ First Trust Water [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒ Hartford Municipal Opportunities [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	None
SFP/MMLIS Individual Acct - MG ⇒ Hartford Schroders International Stock [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	None	None
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI EAFE [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI USA Small Cap [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒ iShares MSCI USA ESG SLC [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒ JPMorgan Hedged Equity [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	None
SFP/MMLIS Individual Acct - MG ⇒ JPMorgan High Yield Municipal Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒ JPMorgan Short-Intermediate Muni Bond [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	None
SFP/MMLIS Individual Acct - MG ⇒ SPDR MSCI Emerging Markets Fossil Fuel Free ETC [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	None
SFP/MMLIS Individual Acct - MG ⇒	SP	None	Capital Gains,	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Total Bond Market ETF [EF]			Interest		
SFP/MMLIS Individual Acct - MG ⇒ Vanguard Total International Bond Index ETF [EF]	SP	None	Capital Gains, Interest	\$201 - \$1,000	\$201 - \$1,000
SFP/MMLIS Individual Acct - MG ⇒ Vanguard Total International Stock Index ETF [EF]	SP	None	Capital Gains, Interest	None	\$1,001 - \$2,500
SFP/MMLIS Individual Acct - MG ⇒ Vanguard Total Stock Market ETF [EF]	SP	None	Capital Gains, Dividends	\$5,001 - \$15,000	\$201 - \$1,000
SFP/MMLIS Roth IRA - JA ⇒ Fidelity Government Cash Reserves [MF]		\$1,001 - \$15,000	Tax-Deferred		
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI USA Small Cap ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESC MSCI USA ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESG MSCI EAFE [EF]		\$1,001 - \$15,000	Tax-Deferred		
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC [EF]		\$1,001 - \$15,000	Tax-Deferred		
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI USA ESG SLC [EF]		\$1,001 - \$15,000	Tax-Deferred		
SFP/MMLIS Roth IRA - MG ⇒ Ariel Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SFP/MMLIS Roth IRA - MG ⇒ Calvert Small Cap [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SFP/MMLIS Roth IRA - MG ⇒ Fidelity Government Cash Reserves [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
SFP/MMLIS Roth IRA - MG ⇒ First Trust Water [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
SFP/MMLIS Roth IRA - MG ⇒ Hartford Schroders International Stock [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI EAFE [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI EM [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI USA [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SFP/MMLIS Roth IRA - MG ⇒ iShares MSCI USA ESG SLC [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SFP/MMLIS Roth IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
USAA checking [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
USAA Checking - Joint [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
USAA Individual Account - JA ⇒ USAA Science & Technology Retail [MF]		None	Capital Gains, Dividends	None	\$2,501 - \$5,000
USAA Savings - Joint [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200

* 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
City of Newton	Salary	\$9,042.00	\$9,750.00
Liberty Mutual	Salary	N/A	\$170,950.00
Bain & Company	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Metro Credit Union	2018	Mortgage primary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Product Manager	Barkly Protects

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

529 DC1 (Owner: DC) LOCATION: MA - Bain 401k (Owner: SP) - Liberty Mutual 401k - SFP/MMLIS Individual Acct - JA LOCATION: US - SFP/MMLIS Individual Acct - MG (Owner: SP) LOCATION: US - SFP/MMLIS Roth IRA - JA - SFP/MMLIS Roth IRA - MG (Owner: SP) - USAA Individual Account - JA LOCATION: US
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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: Jake Auchincloss , 08/13/2020