



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Adam Roger Hattersley  
**Status:** Congressional Candidate  
**State/District:** FL15

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2020  
**Filing Date:** 05/7/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise Investment Portfolio ⇒ ABB Ltd (ABB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ AMC Networks Inc. - Class A (AMCX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Ameriprise ETF [EF]		\$100,001 - \$250,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Ameriprise ETF (spouse) [EF]		\$15,001 - \$50,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Ameriprise Mutual Funds [MF]		\$15,001 - \$50,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Coca-Cola European Partners plc Ordinary		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Shares (CCEP) [ST]					
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Emerson Electric Company (EMR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ GlaxoSmithKline PLC (GSK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Hasbro, Inc. (HAS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ HSBC Holdings, plc. (HSBC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Invitation Homes Inc. (INVH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Marathon Petroleum Corporation (MPC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Mosaic Company (MOS) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Oracle Corporation (ORCL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Unit Investment Trust [OT]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Unit Investment Trust					
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
COMMENTS: Dividends held in IRA					
Ameriprise Investment Portfolio ⇒ Variable annuity [OT]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Variable annuity					
COMMENTS: Dividends held in IRA					
C-Suite Promotions, 50% Interest [OL]	JT	\$15,001 - \$50,000	None		
LOCATION: Riverview / Hillsborough, FL, US					
DESCRIPTION: Small business					
COMMENTS: I take no income, it is too small of a business					
Navy Federal Credit Union account [BA]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: NFCU savings and checking accounts					
USAA checking account [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: USAA checking account					

\* 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 Florida	State Representative salary	\$29,697.00	\$29,697.00
TRINET HR III, INC	Spouse salary	\$110,000.00	\$153,250.00

#### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Lakeview Loan Servicing, LLC	June 2009	Home mortgage	\$100,001 - \$250,000
COMMENTS: Home mortgage				

#### SCHEDULE E: POSITIONS

Position	Name of Organization
Selective Service Board member	US Selective Service System
COMMENTS: Volunteer position on the Selective Service Board	

#### SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Branch Gymnastics (Kalamazoo, MI, US)	Sale of competitive event giveaways
Goucher College (Baltimore, MD, US)	Sale of event giveaways and promotional items
Naylor Association Solutions (McLean, VA, US)	Sale of event giveaways and promotional items
USA Competitions (Cooper City, FL, US)	Sale of competitive event giveaways

#### SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> <li>o Ameriprise Investment Portfolio <ul style="list-style-type: none"> <li>LOCATION: US</li> <li>DESCRIPTION: Ameriprise Investment Portfolio</li> </ul> </li> </ul>
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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:** Adam Roger Hattersley , 05/7/2020