



Filing ID #10035859

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jerry Lee Carl Jr.
Status: Congressional Candidate
State/District: AL01

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
Advance LLC [OL]		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	None
LOCATION: Mobile, AL, US DESCRIPTION: Advance LLC-Commercial Real Estate					
Ascensus 401k ⇒ Goldman Sachs Balanced Strat C [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
Ascensus 401k ⇒ Goldman Sachs Growth & Inc Strat C [MF]		\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
Ascensus 401k ⇒ Goldman Sachs Growth Strat C [MF]		\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
Ascensus 401k ⇒ Goldman Sachs Growth Strat C [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
AXA Life Insurance ⇒ AXA Large Cap Growth Managed		\$50,001 - \$100,000	Capital Gains, Dividends,	\$5,001 - \$15,000	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Volatility [MF]			Interest		
AXA Life Insurance ⇒ AXA Moderate Allocation [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
AXA Life Insurance ⇒ AXA/AB Small Cap Growth [MF]		\$50,001 - \$100,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
AXA Life Insurance ⇒ EQ/BlackRock Basic Value Equity [MF]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Butterfly & Cricket LLC [OL] LOCATION: Mobile, AL, US DESCRIPTION: Butterfly & Cricket LLC-Timber Land	JT	\$500,001 - \$1,000,000	Partnership Income	None	None
Community Bank [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
ECM Home Health Services Inc. [OL] LOCATION: Mobile, AL, US DESCRIPTION: ECM Home Health Services	JT	\$500,001 - \$1,000,000	S Corporation Income	\$100,001 - \$1,000,000	\$15,001 - \$50,000
PNC Bank Accounts [BA]	JT	\$250,001 - \$500,000	Interest	\$2,501 - \$5,000	\$201 - \$1,000
Prudential Annuity ⇒ AST Capital Growth Asset [MF]		\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Prudential Annuity ⇒ AST Capital Growth Asset [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Prudential Annuity ⇒ AST Capital Growth Asset [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
River Oaks Landing LLC [OL] LOCATION: Mobile, AL, US DESCRIPTION: River Oaks Landing-Bed and Breakfast		\$1,000,001 - \$5,000,000	Rent	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RSA Alabama [DB]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Trustmark Bank [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
ECM Home Health Services	Salary	\$89,192.00	\$71,934.00
ECM Home Health Services	Spouse Salary	N/A	N/A
Mobile County Commission	Salary	\$94,369.00	\$85,639.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Hancock Whitney	March 2019	Line of Credit	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Vice President	ECM Home Health Services, Inc.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Ascensus 401k
- Ascensus 401k (Owner: SP)

- AXA Life Insurance
- Prudential Annuity
- Prudential Annuity (Owner: SP)

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: Jerry Lee Carl Jr., 05/14/2020