



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jesse Mermell
Status: Congressional Candidate
State/District: MA04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 05/15/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BB&N TIAA Retirement Account [MF] <small>DESCRIPTION: retirement account from previous employer</small>		\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
Massachusetts State Employees' Retirement System [DB] <small>DESCRIPTION: MA state retirement account from previous job</small>		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Planned Parenthood League of Massachusetts 403(b) Plan ⇒ Planned Parenthood League of Massachusetts 403(b) Plan [MF] <small>DESCRIPTION: 403b plan from previous employer</small>		\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
ROTH IRA ⇒ ROTH IRA [MF] <small>DESCRIPTION: retirement savings</small>		\$15,001 - \$50,000	Interest	None	\$2,501 - \$5,000
TRADITIONAL IRA ⇒ IRA Standard [MF] <small>DESCRIPTION: retirement savings</small>		\$15,001 - \$50,000	Interest	None	\$2,501 - \$5,000

* 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
The Alliance for Business Leadership	salary		\$152,831.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	PHH Mortgage Services	April 2013	mortgage on primary home	\$100,001 - \$250,000
	Eastern Bank	June 2017	HELOC	\$15,001 - \$50,000
	Barclays Bank Delaware	card opened February 2015	credit card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
President	The Alliance for Business Leadership

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2004	Buckingham Browne & Nichols, Jesse Mermell	Ongoing retirement account as a former BB&N employee (former employer no longer contributing).
January 2013	Commonwealth of Massachusetts, Jesse Mermell	Ongoing retirement account as a former state employee (former employer no longer contributing).
April 2009	Planned Parenthood League of Massachusetts, Jesse Mermell	Ongoing retirement account as a former PPLM employee (former employer no longer contributing).

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">Planned Parenthood League of Massachusetts 403(b) Plan DESCRIPTION: 403b plan from previous employerROTH IRA

o TRADITIONAL IRA

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

COMMENTS

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: Jesse Mermell , 05/15/2020