



Filing ID #10035945

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jeanne Ives
Status: Congressional Candidate
State/District: IL06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 05/15/2020
Period Covered: 01/01/2019– 04/16/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401K ⇒ Dlwr SM Cap val Inst [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID 500 Index [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
401K ⇒ FID Diversified Intl K [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID Extd Mkt Idx [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID Growth Co K [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
401K ⇒ FID Low Priced Stk K [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID OTC K [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401K ⇒ FID US Bonds Idx [CS] DESCRIPTION: bond	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID Worldwide [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ I O Develop Mkt Y [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ JAN ASP Enterprise I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ Jhancock Dscpl Val I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ Metwest TOT RTN BD ! [CS] DESCRIPTION: Bond	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ PRU Guaranteed Inc [CS] DESCRIPTION: bond	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ TRP New Horizons [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ Vang Div Growth INV [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ Victory S EST Val R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA EMERGING MARKETS CORE EQUITY I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA FIVE-YEAR GLOBAL FIXED PTF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA INTERM GOVT FIXED INCOME I [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DFA INTERNATIONAL VALUE I [MF]					
Edelman Financial/Ameritrade Account ⇒ DFA INTL SM CAP VAL PORT [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA LARGE CAP INTERNATIONAL I [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA SHORT RM EXT QUALITY PTF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA US LARGE CAP VAL PORT [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA US SMALL CAP I [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ Dimensional Fund Advisors [MF]	SP	\$1,001 - \$15,000	Dividends, Interest	None	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ Dimensional US SM CAP INST [MF]	DC	\$1 - \$1,000	Dividends	None	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ DIMENSIONAL World EX US CORE EQTY [MF]	DC	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ Federated Investments Federated Treasury Oblig Fund [BA]	DC	\$1 - \$1,000	Interest	None	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ Federated Investments Federated Treasury Oblig Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ Federated Investments Federated Treasury Oblig Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	None	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ Ishares RUS 1000 VAL EFT [EF]	DC	\$1 - \$1,000	Dividends	None	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ ISHARES Trust [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Edelman Financial/Ameritrade Account ⇒ ISHARES TRUST CORE S&P MCP ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ ISHARES TRUST EXPONENTIAL TECH ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ ISHARES TRUST IBOXFX INV CP ET [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ ISHARES TRUST RUS 1000 VAL ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ SPDR INDEX S&P North American [EF]	DC	\$1 - \$1,000	Dividends	None	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ SPDR Series Trust Port Mortg ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ SPDR Series Trust S&P Kenosha New Econ [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ SPOR INDEX SHARES FUNDS S&P NORTH AMER ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ SPORS INDEX SHARES FUNDS [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	None	\$201 - \$1,000
Edelman Financial/Ameritrade Account ⇒ VANGUARD GROWTH ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ Vanguard Real Estate [EF]	DC	\$1 - \$1,000	Dividends	None	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ VANGUARD REAL ESTATE ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ VANGUARD REAL ESTATE ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ Vanguard Tot BND MKT [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Edelman Financial/Ameritrade Account ⇒ Vanguard Tot STK MKT [EF]	DC	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ VANGUARD TOTAL BND MRKT ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1,001 - \$2,500
Edelman Financial/Ameritrade Account ⇒ VANGUARD TOTAL STK MKT ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1,001 - \$2,500
USAA/UTMA ⇒ Halliburton Company (HAL) [ST]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
USAA/UTMA ⇒ USAA Treasury Mkt [BA]		\$1 - \$1,000	Dividends	None	\$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
Henkels & McCoy	spouse salary	\$48,059.00	\$176,813.00
Prairie Fire LLC	owner income	\$.00	\$25,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	USAA	2020	credit card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member, Board of Directors	Illinois Right to Life Action

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
Prairie Fire LLC (Wheaton, IL, US)	sales and media content

SCHEDULE A ASSET CLASS DETAILS

- 401K (Owner: SP)
DESCRIPTION: Henkels & McCoy 401k
- Edelman Financial/Ameritrade Account (Owner: SP)
- Edelman Financial/Ameritrade Account (Owner: DC)
LOCATION: US
- USAA/UTMA
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: Jeanne Ives , 05/15/2020