



Filing ID #10035999

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Renee Unterman  
**Status:** Congressional Candidate  
**State/District:** GA07

## 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 |
|--------------------------------------------------------------------|-------|-----------------------|----------------|-------------------------------|-----------------------|
| AbbVie Inc. (ABBV) [ST]                                            |       | \$15,001 - \$50,000   | Dividends      | \$1,001 - \$2,500             | \$1,001 - \$2,500     |
| American Developing World GFC Fund [MF]                            |       | \$50,001 - \$100,000  | Tax-Deferred   |                               |                       |
| Bono Fund of America [MF]                                          |       | \$100,001 - \$250,000 | Tax-Deferred   |                               |                       |
| Capital Income Builder Fund [MF]                                   |       | \$100,001 - \$250,000 | Tax-Deferred   |                               |                       |
| Cash at Pershing LLC [OT]                                          |       | \$15,001 - \$50,000   | Interest       | \$1 - \$200                   | \$1 - \$200           |
| DESCRIPTION: Cash held in interest bearing account at Pershing LLC |       |                       |                |                               |                       |
| Europacific Growth Fund [MF]                                       |       | \$50,001 - \$100,000  | Tax-Deferred   |                               |                       |
| First Eagle Global [MF]                                            |       | \$100,001 - \$250,000 | Tax-Deferred   |                               |                       |

| Asset                                      | Owner | Value of Asset        | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--------------------------------------------|-------|-----------------------|----------------|-------------------------------|-----------------------|
| Franklin Global & Precious Metals [MF]     |       | \$15,001 - \$50,000   | Tax-Deferred   |                               |                       |
| Franklin High Income [MF]                  |       | \$50,001 - \$100,000  | Tax-Deferred   |                               |                       |
| Franklin Mutual Global Discovery [MF]      |       | \$50,001 - \$100,000  | Tax-Deferred   |                               |                       |
| Franklin Rising Dividends [MF]             |       | \$100,001 - \$250,000 | Tax-Deferred   |                               |                       |
| Franklin Strategic Income [MF]             |       | \$100,001 - \$250,000 | Tax-Deferred   |                               |                       |
| Franklin US Govt Securities [MF]           |       | \$50,001 - \$100,000  | Tax-Deferred   |                               |                       |
| Intel Corporation (INTC) [ST]              |       | \$15,001 - \$50,000   | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |
| JP Russell Commodities Fund [MF]           |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| JP Russell Emerging Markets [MF]           |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| JP Russell Global Infrastructure Fund [MF] |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| JP Russell Global Real Estate Fund [MF]    |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| JP Russell Intl Development Fund [MF]      |       | \$15,001 - \$50,000   | Tax-Deferred   |                               |                       |
| JP Russell Multi Asset Growth Fund [MF]    |       | \$15,001 - \$50,000   | Tax-Deferred   |                               |                       |
| JP Russell Opp Credit Fund [MF]            |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| JP Russell Strategic Bond Fund [MF]        |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| JP Russell US Small Cap Fund [MF]          |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| JP Russell US Strategic Equity Fund [MF]   |       | \$15,001 - \$50,000   | Tax-Deferred   |                               |                       |
| Norfolk Southern Corporation (NSC) [ST]    |       | \$15,001 - \$50,000   | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |

| Asset                           | Owner | Value of Asset        | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---------------------------------|-------|-----------------------|----------------|-------------------------------|-----------------------|
| PIMCO All Asset [MF]            |       | \$50,001 - \$100,000  | Tax-Deferred   |                               |                       |
| Snall Cap World [MF]            |       | \$100,001 - \$250,000 | Tax-Deferred   |                               |                       |
| The Growth Fund of America [MF] |       | \$100,001 - \$250,000 | Tax-Deferred   |                               |                       |
| The New Economy Fund [MF]       |       | \$100,001 - \$250,000 | Tax-Deferred   |                               |                       |
| TJX Companies, Inc. (TJX) [ST]  |       | \$15,001 - \$50,000   | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |

\* 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 Georgia (Legislative Salary) | Salary         | \$20,730.00                   | \$34,726.00           |
| General Motors Pension                | Spouse Pension | N/A                           | N/A                   |

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

| Position                   | Name of Organization                             |
|----------------------------|--------------------------------------------------|
| Advisory Board             | Georgia World Congress Center                    |
| Advisory Board Member      | Friends of Gwinnett County Senior Services       |
| Board of Directors         | Georgia Children's Cabinet                       |
| Board of Directors         | Gwinnett Chamber of Commerce                     |
| Council Member             | Behavioral Coordinating Council                  |
| Council Member             | Georgia Council on Lupus Education and Awareness |
| Executive Advisory Council | Emory Brain Health Center                        |
|                            |                                                  |

| Position       | Name of Organization                                             |
|----------------|------------------------------------------------------------------|
| Council Member | Georgia Palliative Care and Quality of Life Coordinating Council |
| Member         | Georgia's Older Adults Cabinet                                   |

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## 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:** Renee Unterman , 05/15/2020