



Filing ID #10036024

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Rosemary Becchi
Status: Congressional Candidate
State/District: NJ11

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Becchi Consulting [OL]		\$100,001 - \$250,000	None		
LOCATION: Short Hills, NJ, US DESCRIPTION: Consulting services					
FB 529 ⇒ AMCAP Fund 529A [MF]		\$50,001 - \$100,000	Tax-Deferred		
FB 529 ⇒ AMCAP Fund 529B [MF]		\$50,001 - \$100,000	Tax-Deferred		
FB 529 ⇒ American Funds MM Fund 529A [MF]		\$50,001 - \$100,000	Tax-Deferred		
FB 529 ⇒ American Funds MM Fund 529B [MF]		\$15,001 - \$50,000	Tax-Deferred		
FB 529 ⇒ American High Income Trust 529A [MF]		\$50,001 - \$100,000	Tax-Deferred		
FB 529 ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American High Income Trust 529B [MF]					
GB 529 ⇒ AMCAP Fund 529A [MF]		\$15,001 - \$50,000	Tax-Deferred		
GB 529 ⇒ AMCAP Fund 529B [MF]		\$15,001 - \$50,000	Tax-Deferred		
GB 529 ⇒ American Funds MM Fund 529A [MF]		\$15,001 - \$50,000	Tax-Deferred		
GB 529 ⇒ American Funds MM Fund 529B [MF]		\$15,001 - \$50,000	Tax-Deferred		
GB 529 ⇒ American High Income Trust 529A [MF]		\$15,001 - \$50,000	Tax-Deferred		
GB 529 ⇒ American High Income Trust 529B [MF]		\$15,001 - \$50,000	Tax-Deferred		
IB 529 ⇒ AMCAP Fund 529A [MF]		\$15,001 - \$50,000	Tax-Deferred		
IB 529 ⇒ AMCAP Fund 529B [MF]		\$15,001 - \$50,000	Tax-Deferred		
IB 529 ⇒ American Funds MM Fund 529A [MF]		\$15,001 - \$50,000	Tax-Deferred		
IB 529 ⇒ American Funds MM Fund 529B [MF]		\$15,001 - \$50,000	Tax-Deferred		
IB 529 ⇒ American High Income Trust 529A [MF]		\$15,001 - \$50,000	Tax-Deferred		
IB 529 ⇒ American High Income Trust 529B [MF]		\$15,001 - \$50,000	Tax-Deferred		
SB 401k ⇒ Vanguard Target 2030 [MF]		\$250,001 - \$500,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SB IRA Rollover ⇒ FAGIX Fidelity [MF]		\$1,001 - \$15,000	Tax-Deferred		
SB IRA Rollover ⇒ FC TDX Strat. Adviser [MF]		\$250,001 - \$500,000	Tax-Deferred		
SB IRA Rollover ⇒ FCNVX Fid. Cons. [MF]		\$1,001 - \$15,000	Tax-Deferred		
SB IRA Rollover ⇒ FGoMX St. Ad. [MF]		\$15,001 - \$50,000	Tax-Deferred		
SB IRA Rollover ⇒ FNGX Strat. Advisor [MF]		\$100,001 - \$250,000	Tax-Deferred		
SB IRA Rollover ⇒ FSKAX Fid. Total Market [MF]		\$15,001 - \$50,000	Tax-Deferred		
SB IRA Rollover ⇒ FUSIX Strat, Ad. [MF]		\$50,001 - \$100,000	Tax-Deferred		
SEP Account ⇒ Cash [IH]		\$1,001 - \$15,000	Tax-Deferred		
SEP Account ⇒ Ishare S&P Global Health [MF]		\$15,001 - \$50,000	Tax-Deferred		
SEP Account ⇒ JPM Core Bond [MF]		\$100,001 - \$250,000	Tax-Deferred		
SEP Account ⇒ JPM Equity Index [MF]		\$250,001 - \$500,000	Tax-Deferred		
SEP Account ⇒ JPM Int. Eq. Index [MF]		\$50,001 - \$100,000	Tax-Deferred		
SEP Account ⇒ JPM Inv. Growth [MF]		\$100,001 - \$250,000	Tax-Deferred		
SEP Account ⇒ JPM Mkt. Exp Enh Index [MF]		\$15,001 - \$50,000	Tax-Deferred		
SEP Account ⇒ Vanguard Info Tec [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SEP Account ⇒ Vangard Total Bond [MF]					
		\$15,001 - \$50,000	Tax-Deferred		

* 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
EY	Spouse Salary	N/A	N/A
Becchi Consulting	Salary	\$300,000.00	\$750,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	US Senate Federal Credit Union	June 1995	line of credit & Visa	\$50,001 - \$100,000
JT	Citibank	Sept. 2011	line of credit	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Running Start
President	Jersey First
President	Truth In Numbers
Managing Member	Becchi Consulting

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
Brownstein Hyatt Farber & Schreck (Washington, DC, US)	Legal/Consulting

SCHEDULE A ASSET CLASS DETAILS

- FB 529 (Owner: JT)
LOCATION: VA
- GB 529 (Owner: JT)
LOCATION: VA
- IB 529 (Owner: JT)
LOCATION: VA
- SB 401k (Owner: SP)
- SB IRA Rollover (Owner: SP)
- SEP Account

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: Rosemary Becchi , 08/13/2020