



Filing ID #10036433

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Karen Christine Handel
Status: Congressional Candidate
State/District: GA06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 07/24/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baird ⇒ American Funds Capital Income Builder Class F-1 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Baird ⇒ American Funds Capital World Growth and Income Fund Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		
Baird ⇒ American Funds The Growth Fund of America Class A [MF]		\$50,001 - \$100,000	Tax-Deferred		
Baird ⇒ American Funds The Growth Fund of America Class F-1 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Baird ⇒ American Funds Washington Mutual Investors Fund Class A [MF]		\$50,001 - \$100,000	Tax-Deferred		
Baird ⇒ American Funds Washington Mutual Investors Fund Class F-1A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baird ⇒ Dearborn Partners Rising Dividend Fund Class C Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		
Baird ⇒ Dearborn Partners Rising Dividend Fund Class C Shares [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Baird ⇒ First Eagle Global Fund Class C [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Baird ⇒ First Eagle U.S. Value Fund Class C [MF]	SP	None	Tax-Deferred		
Baird ⇒ Franklin Mutual Shares Fund Class C [MF]	SP	None	Tax-Deferred		
Baird ⇒ Thornburg International Value Fund Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Cogent Strategies LLC, 100% Interest [OL]		\$15,001 - \$50,000	Business income	\$15,001 - \$50,000	None
LOCATION: Roswell, GA, US DESCRIPTION: Strategic Planning					
GaBreeze ⇒ LrgCapGrwStk [MF]		\$15,001 - \$50,000	Tax-Deferred		
GaBreeze ⇒ MidCapCoreStk [MF]		\$15,001 - \$50,000	Tax-Deferred		
GaBreeze ⇒ SmCapCoreStk [MF]		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual ⇒ High Yield Bond (MSA/Federated Inv.)-B [MF]		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Mutual ⇒ Index 500 Stock (MSA)-B [MF]		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Mutual ⇒ Small Cap Growth Stock (MSA/Wellington)-B [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TextGov LLC, 100% Interest [OL]	SP	\$50,001 - \$100,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Roswell, GA, US DESCRIPTION: TextGov provides messaging services to various state, county and local courts					
The Principal Bank [IH]		\$1,001 - \$15,000	Tax-Deferred		
TIAA Fulton County Deferred Compensation Plan ⇒ Gallard Retirement Income 60 [MF]		\$1,001 - \$15,000	Tax-Deferred		
TIAA Fulton County Deferred Compensation Plan ⇒ Metrop West Tot Ret Bd M [MF]		\$1,001 - \$15,000	Tax-Deferred		
TIAA Fulton County Deferred Compensation Plan ⇒ T Rowe Price Gr Stk Adv [MF]		\$1,001 - \$15,000	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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Marriott Chase Credit Card	March 2018	credit card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Principal	Cogent Strategies LLC
COMMENTS: position in 2019 only	
Member of Congress	U.S. House of Representatives
COMMENTS: 2018	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2003	Fulton County, GA	Continued participation in deferred compensation plan

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

Source (Name and Address)	Brief Description of Duties
GLA (Atlanta, GA, US)	Strategic Planning

SCHEDULE A ASSET CLASS DETAILS

◦ Baird (Owner: SP) DESCRIPTION: Steve's Baird IRA ◦ Baird DESCRIPTION: Karen's Baird IRA ◦ GaBreeze DESCRIPTION: Georgia Breeze ◦ Northwestern Mutual ◦ TIAA Fulton County Deferred Compensation Plan
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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?

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 Yes

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 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?

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 Yes

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 No

CERTIFICATION AND SIGNATURE

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 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: Hon. Karen Christine Handel , 07/24/2020