



Filing ID #10037404

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Helen Brady
Status: Congressional Candidate
State/District: MA09

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 11/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BSO Employee Credit Union Savings [BA]		\$1,001 - \$15,000	None		
Cambridge Trust Checking Account [BA]		\$1,001 - \$15,000	None		
Fidelity [IH]	SP	\$100,001 - \$250,000	None		
DESCRIPTION: Husbands IRA from the Boston Phoenix					
Fidelity 403B [DB]		\$250,001 - \$500,000	Tax-Deferred		
Helen Brady Trust ⇒ DC1 [OT]	JT	\$500,001 - \$1,000,000	Trust not managed by candidate	Not Applicable	Not Applicable
DESCRIPTION: Brady Children's Trust funds managed and invested by third party and not accessible to candidate					
Helen Brady Trust ⇒ DC2 [OT]	JT	\$500,001 - \$1,000,000	Trust managed by third party	Not Applicable	Not Applicable
DESCRIPTION: Brady Children's Trust funds managed and invested by third party and not accessible to candidate.					
Helen Brady Trust ⇒	JT	\$500,001 -	trust managed by	Not Applicable	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DC3 [OT]		\$1,000,000	third party		
DESCRIPTION: Brady Children's Trust funds managed and invested by third party and not accessible to candidate					
Helen Brady Trust ⇒ DC4 [OT]	JT	\$500,001 - \$1,000,000	trust managed by third party	Not Applicable	Not Applicable
DESCRIPTION: Brady Children's Trust funds managed and invested by third party and not accessible to candidate					
Helen Brady Trust ⇒ Helen Brady Trust [OT]	JT	\$1,000,001 - \$5,000,000	trust managed by third party	Not Applicable	Not Applicable
DESCRIPTION: Brady Trust fund managed and invested by third party and not accessible to candidate without permission.					
RB Checking [BA]		\$15,001 - \$50,000	None		

* 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
St. Sebastions School Needham MA/St. Patricks School Boston MA	Spouse	\$53,332.00	\$48,969.00
Boston Symphony Orchestra	Salary	\$41,688.00	\$103,108.00
Massachusetts Unemployment	Unemployment Insurance Massachusetts	\$25,764.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America	Cumulative	Credit Card Charges	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Massachusetts Fiscal Alliance

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2020	Employee Pension Boston Symphony Orchestra, Inc.	Participated in Pension program at BSO since 1988

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- o Helen Brady Trust (Owner: JT)
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: Helen Brady , 11/13/2020