



Filing ID #10039231

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Christina Hale
Status: Congressional Candidate
State/District: IN05

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 12/11/2020
Period Covered: 01/01/2019– 11/30/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BMO Harris Bank Money Market Account [BA]	SP	\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Charles Schwab Brokerage ⇒ Acreage Holdings Inc (ACRHF) [PS]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Acreage Holdings Inc (ACRHF)					
Charles Schwab Brokerage ⇒ American Funds SMALLCAP World Fund Class F-3 [MF]	SP	\$1,001 - \$15,000	None		
Charles Schwab Brokerage ⇒ Apple Inc. (AAPL) [ST]	SP	\$1,001 - \$15,000	None		
Charles Schwab Brokerage ⇒ Bank Sweep Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ Catalyst/Millburn Hedge Strategy Fund C (MBXIX) [MF]	SP	\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab Brokerage ⇒ Charles Schwab US REIT ETF (SCHH) [EF]	SP	None	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab Brokerage ⇒ Chevron Corporation (CVX) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ DFA Emerging Markets Core Equity Portfolio Institutional Class (DFCEX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab Brokerage ⇒ DFA International Small Cap Value Portfolio Institutional Class (DISVX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab Brokerage ⇒ DFA Real Estate Securities Portfolio Institutional Class (DFREX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Charles Schwab Brokerage ⇒ DFA Tax Managed International Value Portfolio (DTMIX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab Brokerage ⇒ DFA Tax-Managed U.S. Targeted Value Portfolio (DTMVX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab Brokerage ⇒ DFA U.S. Large Cap Value Portfolio Institutional Class (DFLVX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab Brokerage ⇒ Eli Lilly and Company (LLY) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ Energy Transfer LP Common Units (ET) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
Charles Schwab Brokerage ⇒ Enterprise Products Partners L.P. (EPD) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab Brokerage ⇒ Ford Motor Company (F) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab Brokerage ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab Brokerage ⇒ John Hancock Multifactor Mid Cap ETF (JHMM) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ Schwab Fundamental International Large Company Index Fund (SFNNX) [MF]	SP	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Charles Schwab Brokerage ⇒ Schwab Fundamental US Large Company Index Fund (SFLNX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Charles Schwab Brokerage ⇒ Schwab Fundamental US Small Company Index Fund (SFSNX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Charles Schwab Brokerage ⇒ Schwab® S&P 500 Index Fund (SWPPX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Charles Schwab Brokerage ⇒ SPDR S&P 400 Mid Cap Value ETF (MDYV) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab Brokerage ⇒ T ROWE PRICE GLOBAL REAL ESTATE FUND (PAGEX) [MF]	SP	None	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab Roth IRA ⇒ American Funds New World Fund Class F-1 (NWFFX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Bank Sweep Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ CatalystMillburn Hedge Strategy Fund Class A (MBXAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ DFA Emerging Markets Core Equity Portfolio Institutional Class (DFCEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ DFA International Small Cap Value Portfolio Institutional Class (DISVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Invesco S&P MidCap Momentum ETF (XMMO) [EF]					
Charles Schwab Roth IRA ⇒ Schwab Fundamental US Large Company Index Fund (SFLNX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab Fundamental US Small Company Index Fund (SFSNX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab US Mid-Cap ETF (SCHM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab US Small Cap ETF (SCHA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Vanguard Real Estate Index Fund ETF (VNQ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Wisdomtree Global ex-US Quality Dividend Growth ETF (DNL) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
John Hancock 401k ⇒ John Hancock Multimanager Aggressive Lifestyle Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ American Funds Fundamental Investors® Class C (AFICX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ AT&T Inc. (T) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ Brookfield Infrastructure Partners LP Class A Subordinate Voting Shares (BIPC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ Brookfield Infrastructure Partners LP Limited Partnership Units (BIP) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ ClearBridge Aggressive Growth Fund Class C (SAGCX) [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley Traditional IRA ⇒ Enterprise Products Partners L.P. (EPD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ Franklin Rising Dividends Fund Class C (FRDTX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ Morgan Stanley Bank (cash account) [BA]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ Pepsico, Inc. (PEP) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ Pioneer Fundamental Growth Fund Class C (FUNCX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Morgan Stanley Traditional IRA ⇒ ProShares S&P 500 Dividend Aristocrats ETF (NOBL) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Residential Rental Property [RP]	JT	\$500,001 - \$1,000,000	Rent	None	\$1,001 - \$2,500
LOCATION: Marco Island, FL, US					

* 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
Monday McElwee & Albright	Spouse Partnership Income	N/A	N/A
Kiwanis International	Salary	N/A	\$113,022.00
Flock Realty Group	Spouse Commission	N/A	N/A
ITPA, Inc.	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Cenlar	July 2015	Mortgage on Rental Property, Marco Island, FL	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Executive Director	Kiwanis International

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Charles Schwab Brokerage (Owner: SP)
LOCATION: US
- Charles Schwab Roth IRA (Owner: SP)
- John Hancock 401k (Owner: SP)
- Morgan Stanley Traditional IRA

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: Christina Hale , 12/11/2020