Filing ID #10039398

Financial Disclosure Report

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Filer Information

Name: Thomas G. McNeill
Status: Congressional Candidate
State/District: UT03

Filing Information

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 01/2/2021
Period Covered: 01/01/2019– 12/31/2020

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank Accounts ⇒ Wells Fargo checking [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200
Bank Accounts ⇒ zion's checking [BA]	JT	$1 - $1,000	None		
Bank Accounts ⇒ Zion's savings [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200
Business ⇒ Skyboots LLC [OL] Location: Orem, UT, US Description: Software-based business	JT	$1,001 - $15,000	None		
Business ⇒ Wells Fargo checking - business account [BA]	JT	$1,001 - $15,000	None		
Capital Group Simple IRA ⇒ American Funds 2030 Target Date-A [MF]		None	Dividends	None	$201 - $1,000
Capital Group Simple IRA ⇒		None	Dividends	$201 - $1,000	$1,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bond Fund of America [MF]					$2,500
Crummey Insurance Trust ⇒ AIG life insurance [WU]		$15,001 - $50,000	None		
Crummey Insurance Trust ⇒ Texas Bank and Trust [BA]		$1 - $1,000	None		
Crummey Insurance Trust ⇒ Vanguard Balanced Index Fund – Admiral Shares [MF]		$15,001 - $50,000	Capital Gains, Dividends	$1,001 - $2,500	None
Crummey Insurance Trust ⇒ Vanguard Cash Reserves Federal Money Market Fund [MF]		$1,001 - $15,000	Dividends	$1 - $200	None
Crummey Insurance Trust ⇒ Vanguard Federal Money Market Fund [MF]		$1 - $1,000	None		
Crummey Insurance Trust ⇒ Vanguard Intermediate-Term Bond Index Fund Admiral Shares [MF]		$1,001 - $15,000	Capital Gains, Dividends	$1,001 - $2,500	None
Empower Retirement 401K ⇒ Baird Aggregate Bond Inst [MF]		$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Family trust account ⇒ Vanguard Cash Reserves Federal Money Market Fund [MF]	JT	None	Dividends	$201 - $1,000	$201 - $1,000
Family trust account ⇒ Vanguard Cash Reserves Federal Money Market Fund Admiral Shares [MF]	JT	$50,001 - $100,000	None		
Family trust account ⇒ Vanguard Growth Index Fund Admiral Shares [MF]	JT	$100,001 - $250,000	Dividends	$1,001 - $2,500	$1,001 - $2,500
Family trust account ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Family trust account ⇒ Vanguard Total Stock Market Index Fund Admiral Shares [MF]	JT	$500,001 - $1,000,000	Dividends	$5,001 - $15,000	$5,001 - $15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Heartland Advisors ⇒ Heartland Value Fund [MF]	JT	$50,001 - $100,000	Capital Gains, Dividends	$1,001 - $2,500	$1,001 - $2,500
HSA ⇒ Health Equity HSA [OT] Description: Health Savings Account		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
HSA ⇒ Key Bank HSA [OT] Description: Health Savings Account		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Roth IRA account ⇒ Vanguard Target Retirement 2015 Fund [MF]		$15,001 - $50,000	Capital Gains, Dividends	$2,501 - $5,000	$1,001 - $2,500
Traditional IRA account ⇒ Vanguard Intermediate-Term Bond Index Fund Admiral Shares [MF]		$100,001 - $250,000	Capital Gains, Dividends	$2,501 - $5,000	$2,501 - $5,000
Traditional IRA account ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares [MF]		$50,001 - $100,000	Dividends	$201 - $1,000	None
Traditional IRA account ⇒ Vanguard Target Retirement 2025 Fund [MF]		None	Capital Gains, Dividends	None	$1,001 - $2,500
Traditional IRA account ⇒ Vanguard Total International Bond Index Fund Admiral Shares [MF]		$100,001 - $250,000	Capital Gains, Dividends	$1,001 - $2,500	$2,501 - $5,000
Traditional IRA account ⇒ Vanguard Total International Stock Index Fund Admiral Shares [MF]		$100,001 - $250,000	Dividends	$2,501 - $5,000	$2,501 - $5,000
Traditional IRA brokerage account ⇒ Vanguard Federal Money Market Fund [MF]		$50,001 - $100,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ D F A EMERGING MARKETS CORE EQUITY I [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ D F A FIVE-YEAR GLOBAL FIXED-INCOME I [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ D F A INFLATION-PROTECTED SECURITIES I	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[MF]					
Wife 401K ⇒ D F A INTERNATIONAL REAL ESTATE SEC I [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ D F A INTERNATIONAL SMALL CAP VALUE I [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ D F A INTERNATIONAL SMALL COMPANY I [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ D F A US SMALL CAP I [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ D F A US TARGETED VALUE I [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ DFA INTERNATIONAL VALUE PORTFOLIO III [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ DFA US LARGE CAP VALUE PORTFOLIO III [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ VANGUARD 500 INDEX ADMIRAL [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wife 401K ⇒ VANGUARD REAL ESTATE INDEX - ADMIRAL [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Wife Roth IRA account ⇒ Vanguard Intermediate-Term Bond Index Fund Admiral Shares [MF]	SP	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Wife Roth IRA account ⇒ Vanguard Total International Stock Index Fund Admiral Shares [MF]	SP	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000

* 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
Apex EDI	salary	$133,356.14	$131,215.43
Foundation Source	salary	$8,391.02	N/A
Kids on the Move	spouse salary	N/A	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

Position	Name of Organization
member, president	Skyboots, LLC

Schedule F: Agreements

None disclosed.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Asset Class Details

- Bank Accounts (Owner: JT)
- Business (Owner: JT)
  Location: Orem, UT, US
- Capital Group Simple IRA
  Description: Capital Group / American Funds Simple IRA
- Crummey Insurance Trust
- Empower Retirement 401K
  Description: Empower Retirement 401K
- Family trust account (Owner: JT)
  Description: Vanguard living trust account
- Heartland Advisors (Owner: JT)
- HSA
  Location: US
- Roth IRA account
  Description: Vanguard Roth IRA account
- Traditional IRA account
  Description: Vanguard traditional IRA

- Traditional IRA brokerage account
  Description: Vanguard traditional IRA brokerage account
- Wife 401K (Owner: SP)
  Description: Wife's Newport Group 401K
- Wife Roth IRA account (Owner: SP)
  Description: Vanguard Roth IRA account of wife

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: Thomas G. McNeill , 01/2/2021