



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Cliff Bentz  
**Status:** Congressional Candidate  
**State/District:** OR02

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2020  
**Filing Date:** 01/25/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset       | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|----------------------|----------------|-------------------------------|-----------------------|
| Charles Schwab SEP-IRA ⇒ Amgen Inc. (AMGN) [ST]             | SP    | \$50,001 - \$100,000 | Tax-Deferred   |                               |                       |
| Charles Schwab SEP-IRA ⇒ Bed Bath & Beyond Inc. (BBBY) [ST] | SP    | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Charles Schwab SEP-IRA ⇒ Cash Sweep [BA]                    | SP    | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Charles Schwab SEP-IRA ⇒ Federated MDST Large Cap [MF]      | SP    | \$15,001 - \$50,000  | Tax-Deferred   |                               |                       |
| Charles Schwab SEP-IRA ⇒ Home Depot, Inc. (HD) [ST]         | SP    | \$50,001 - \$100,000 | Tax-Deferred   |                               |                       |
| Charles Schwab SEP-IRA ⇒ Intel Corporation (INTC) [ST]      | SP    | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Charles Schwab SEP-IRA ⇒ Janus Henderson Research Fd [MF]   | SP    | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Charles Schwab SEP-IRA ⇒                                    | SP    | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b>    | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|--|--------------|--------------------------|-----------------------|--------------------------------------|------------------------------|
| Medtronic plc. Ordinary Shares (MDT) [ST]  |              |                          |                       |                                      |                              |
| Charles Schwab SEP-IRA ⇒<br>Oracle Corporation (ORCL) [ST]                                       | SP           | \$15,001 - \$50,000      | Tax-Deferred          |                                      |                              |
| Charles Schwab SEP-IRA ⇒<br>Pfizer, Inc. (PFE) [ST]  | SP           | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| Charles Schwab SEP-IRA ⇒<br>TE Connectivity Ltd. New Switzerland<br>Registered Shares (TEL) [ST] | SP           | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| Charles Schwab SEP-IRA ⇒<br>Vanguard Mid Cap Index Fd [MF]                                       | SP           | \$15,001 - \$50,000      | Tax-Deferred          |                                      |                              |
| Charles Schwab SEP-IRA ⇒<br>Versus Cap Multi Mngr [MF]   | SP           | \$100,001 -<br>\$250,000 | Tax-Deferred          |                                      |                              |
| Edward Jones IRA ⇒<br>Duke Energy Corporation (DUK) [ST]   |              | \$15,001 - \$50,000      | Tax-Deferred          |                                      |                              |
| Edward Jones IRA ⇒<br>Enbridge Inc (ENB) [ST]  |              | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| Edward Jones IRA ⇒<br>Money market [IH]  |              | \$15,001 - \$50,000      | Interest              | \$1 - \$200                          | \$1 - \$200                  |
| Edward Jones IRA ⇒<br>Occidental Petroleum Corporation (OXY) [ST]                                |              | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| IRA Rollover ⇒<br>DFA US Targeted Value - DFFVX [MF]   |              | \$15,001 - \$50,000      | Tax-Deferred          |                                      |                              |
| IRA Rollover ⇒<br>DFA US Targeted Value - DFFVX [MF]   |              | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| IRA Rollover ⇒<br>Southern Company (SO) [ST]   |              | \$1,001 - \$15,000       | Tax-Deferred          |                                      |                              |
| K and A Family Limited Partnership ⇒<br>American Electric Power Company, Inc. (AEP)<br>[ST]      |              | \$1,001 - \$15,000       | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| K and A Family Limited Partnership ⇒<br>American FD Europacific Gwth [MF]                        |              | \$1,001 - \$15,000       | Dividends             | \$1 - \$200                          | \$1 - \$200                  |

| <b>Asset</b>  | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| K and A Family Limited Partnership ⇒ Charles Schwab Bank Sweep [BA]     |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ Chevron Corporation (CVX) [ST]     |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| K and A Family Limited Partnership ⇒ Clorox Company (CLX) [ST]          |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ DFA Emerging Mkts Core Equity [MF] |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ DFA Intl Small Co Port Instl [MF]  |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ DFA US Targeted Value [MF]         |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ Intel Corporation (INTC) [ST]      |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ Johnson & Johnson (JNJ) [ST]       |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ McDonald's Corporation (MCD) [ST]  |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| K and A Family Limited Partnership ⇒ Pimco Incm Inst CL [MF]            |              | \$50,001 - \$100,000  | Interest              | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| DESCRIPTION: Bond fund  |              |                       |                       |                                      |                              |
| K and A Family Limited Partnership ⇒ Procter & Gamble Company (PG) [ST] |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ The Kraft Heinz Company (KHC) [ST] |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ U.S. Bancorp (USB) [ST]            |              | \$15,001 - \$50,000   | Dividends             | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒ UGI Corporation (UGI) [ST]         |              | \$1,001 - \$15,000    | Dividends             | \$1 - \$200                          | \$1 - \$200                  |

| <b>Asset</b>  | <b>Owner</b> | <b>Value of Asset</b>      | <b>Income Type(s)</b>  | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|---|--------------|----------------------------|------------------------|--------------------------------------|------------------------------|
| K and A Family Limited Partnership ⇒<br>Unilever NV (UN) [ST]   |              | \$1,001 - \$15,000         | Dividends              | \$1 - \$200                          | \$1 - \$200                  |
| K and A Family Limited Partnership ⇒<br>Versus Cap Multi Mngr [MF]  |              | \$15,001 - \$50,000        | Dividends              | \$201 - \$1,000                      | \$201 - \$1,000              |
| K and A Family Limited Partnership ⇒<br>Welltower Inc [RE]  |              | \$1,001 - \$15,000         | Dividends              | \$201 - \$1,000                      | \$201 - \$1,000              |
| K and A Family Limited Partnership - Money<br>Market [OT]   |              | \$1,001 - \$15,000         | Dividends,<br>Interest | \$2,501 - \$5,000                    | \$2,501 - \$5,000            |
| DESCRIPTION: 15.518% interest in Limited Partnership for the benefit of a family member. Detail of investments listed on Schedule A |              |                            |                        |                                      |                              |
| Moonriver LLC ⇒<br>1st Ave, Ontario, OK [RP]  |              | \$15,001 - \$50,000        | Rent                   | \$2,501 - \$5,000                    | \$2,501 - \$5,000            |
| LOCATION: Ontario, OR, US<br>DESCRIPTION: Mavis Building  |              |                            |                        |                                      |                              |
| Moonriver LLC ⇒<br>22 Acre Field, Ontario, OR [RP]  |              | \$100,001 -<br>\$250,000   | Rent                   | \$2,501 - \$5,000                    | \$2,501 - \$5,000            |
| LOCATION: Ontario, OR, US   |              |                            |                        |                                      |                              |
| Moonriver LLC ⇒<br>2nd St., Ontario, OR [RP]  |              | \$50,001 -<br>\$100,000    | Rent                   | \$5,001 -<br>\$15,000                | \$5,001 -<br>\$15,000        |
| LOCATION: Ontario, OR, US<br>DESCRIPTION: Stainless Steel Building  |              |                            |                        |                                      |                              |
| Moonriver LLC ⇒<br>2nd St., Ontario, OR [RP]  |              | \$500,001 -<br>\$1,000,000 | Rent                   | \$15,001 -<br>\$50,000               | \$15,001 -<br>\$50,000       |
| LOCATION: Ontario, OR, US<br>DESCRIPTION: Outdoorsman property  |              |                            |                        |                                      |                              |
| Moonriver LLC ⇒<br>2nd St., Ontario, Oregon [RP]  |              | \$50,001 -<br>\$100,000    | Rent                   | \$5,001 -<br>\$15,000                | \$5,001 -<br>\$15,000        |
| LOCATION: Ontario, OR, US<br>DESCRIPTION: Miller Building   |              |                            |                        |                                      |                              |
| Moonriver LLC ⇒<br>4th Ave. Ontario, OR [RP]  |              | \$250,001 -<br>\$500,000   | Rent                   | \$15,001 -<br>\$50,000               | \$15,001 -<br>\$50,000       |
| LOCATION: Ontario, OR, US<br>DESCRIPTION: Custom Truck Building   |              |                            |                        |                                      |                              |
| Ontario Animal Hospital [OL]  | SP           | \$250,001 -<br>\$500,000   | Business income        | \$100,001 -<br>\$1,000,000           | \$100,001 -<br>\$1,000,000   |
| LOCATION: Ontario, OR, US   |              |                            |                        |                                      |                              |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b>   | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|--|--------------|-------------------------|-----------------------|--------------------------------------|------------------------------|
| DESCRIPTION: Schedule C - salary reflected above                                   |              |                         |                       |                                      |                              |
| Oregon Legislators Individual Account Retirement Program [PE]                      |              | \$15,001 - \$50,000     | None                  |                                      |                              |
| RB2EH Enterprises [RP]   |              | \$100,001 - \$250,000   | Rent                  | \$15,001 - \$50,000                  | \$15,001 - \$50,000          |
| LOCATION: Ontario, OR, US<br>DESCRIPTION: Building and parking lot - 25% ownership |              |                         |                       |                                      |                              |
| Rental home - Morgan Ave [RP]  | JT           | \$100,001 - \$250,000   | Rent                  | \$5,001 - \$15,000                   | \$5,001 - \$15,000           |
| LOCATION: Ontario, OR, US  |              |                         |                       |                                      |                              |
| The Bentz Farm ⇒<br>42 acres, Morgan Ave, Ontario, OR [FA]                         |              | \$100,001 - \$250,000   | Rent                  | \$5,001 - \$15,000                   | \$5,001 - \$15,000           |
| LOCATION: Ontario, OR, US<br>DESCRIPTION: Located in Ontario, OR                   |              |                         |                       |                                      |                              |
| The Bentz Farm ⇒<br>71 acre farm - Ontario, Oregon [RP]                            |              | \$500,001 - \$1,000,000 | Rent                  | \$5,001 - \$15,000                   | \$5,001 - \$15,000           |
| LOCATION: Ontario, OR, US<br>DESCRIPTION: Includes residence                       |              |                         |                       |                                      |                              |
| Yturri Rose Keough Plan ⇒<br>American FD Europacific Gwth Fd [MF]                  |              | \$100,001 - \$250,000   | Tax-Deferred          |                                      |                              |
| Yturri Rose Keough Plan ⇒<br>Charles Schwab Bank [BA]                              |              | \$1,001 - \$15,000      | Tax-Deferred          |                                      |                              |
| Yturri Rose Keough Plan ⇒<br>DFA Emerging Mkts Core Equity [MF]                    |              | \$100,001 - \$250,000   | Tax-Deferred          |                                      |                              |
| Yturri Rose Keough Plan ⇒<br>DFA Intl Small Co Port [MF]                           |              | \$50,001 - \$100,000    | Tax-Deferred          |                                      |                              |
| Yturri Rose Keough Plan ⇒<br>DFA US Large Cap Value Port [MF]                      |              | \$50,001 - \$100,000    | Tax-Deferred          |                                      |                              |
| Yturri Rose Keough Plan ⇒<br>DFA US Targeted Value Port [MF]                       |              | \$15,001 - \$50,000     | Tax-Deferred          |                                      |                              |
| Yturri Rose Keough Plan ⇒<br>Metropolitan West Total Return Bond [MF]              |              | \$250,001 - \$500,000   | Tax-Deferred          |                                      |                              |

| Asset  | Owner | Value of Asset           | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|--------------------------|----------------|-------------------------------|-----------------------|
| Yturri Rose Keough Plan ⇒<br>Pimco Incm Inst Cl [MF]       |       | \$250,001 -<br>\$500,000 | Tax-Deferred   |                               |                       |
| Yturri Rose Keough Plan ⇒<br>Vanguard 500 Index FD [MF]    |       | \$100,001 -<br>\$250,000 | Tax-Deferred   |                               |                       |
| Yturri Rose Keough Plan ⇒<br>Vanguard Growth Index FD [MF] |       | \$100,001 -<br>\$250,000 | Tax-Deferred   |                               |                       |
| Yturri Rose Keough Plan ⇒<br>Vanguard Mid Cap Index [MF]   |       | \$15,001 - \$50,000      | Tax-Deferred   |                               |                       |
| Yturri Rose Keough Plan ⇒<br>Vanguard Small Cap Index [MF] |       | \$100,001 -<br>\$250,000 | Tax-Deferred   |                               |                       |
| Yturri Rose Keough Plan ⇒<br>Versus Cap Multi Mngr [MF]    |       | \$100,001 -<br>\$250,000 | Tax-Deferred   |                               |                       |
| Yturri, Rose, LLP Law Firm, 25% Interest [OL]              |       | \$15,001 - \$50,000      | See Schedule C | None                          | None                  |
| LOCATION: Ontario, OR, US                                  |       |                          |                |                               |                       |
| DESCRIPTION: Schedule C shows salary                       |       |                          |                |                               |                       |

\* 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 |
|-------------------------|-------------------|-------------------------------|-----------------------|
| State of Oregon         | Legislator salary | \$31,614.00                   | \$31,614.00           |
| Yturri Rose, LLP        | Law firm salary   | \$43,181.00                   | \$23,961.00           |
| Ontario Animal Hospital | Spouse salary     | N/A                           | N/A                   |

## SCHEDULE D: LIABILITIES

| Owner | Creditor                                       | Date Incurred | Type                                | Amount of Liability      |
|-------|--|---------------|-------------------------------------|--------------------------|
| JT    | Northwest Farm Credit Services,<br>Spokane, WA | December 2019 | Mortgage on 71 acres, Ontario, OR   | \$250,001 -<br>\$500,000 |
| JT    | Columbia Banking System, Tacoma,<br>WA         | February 2005 | Mortgage on Ontario Animal Hospital | \$50,001 -<br>\$100,000  |

| Owner | Creditor                  | Date Incurred | Type                                    | Amount of Liability   |
|-------|---------------------------|---------------|---|-----------------------|
|       | US Bank, Minneapolis, MN  | March 2008    | Mortgage - 2nd St., Ontario, OR         | \$100,001 - \$250,000 |
|       | Ken Bentz, Ontario, OR    | January 2006  | Mortgage on Ontario, OR buildings       | \$15,001 - \$50,000   |
|       | K and A Ltd., Ontario, OR | January 2006  | Mortgages on Ontario, OR buildings      | \$15,001 - \$50,000   |
|       | US Bank, Minneapolis, MN  | March 2008    | Mortgage - 4th Ave, Ontario, OR         | \$50,001 - \$100,000  |
| JT    | Umpqua Bank, Oregon       | January 2016  | Mortgage on Morgan Ave., Ontario rental | \$50,001 - \$100,000  |

## SCHEDULE E: POSITIONS

| Position        | Name of Organization        |
|-----------------|-----------------------------|
| Partner         | Yturri Rose LLP             |
| Limited Partner | K and L Limited Partnership |
| Partner         | RB2EH Enterprises           |

## SCHEDULE F: AGREEMENTS

| Date         | Parties To      | Terms of Agreement        |
|--------------|-----------------|---------------------------|
| January 2008 | State of Oregon | Oregon Legislator Pension |

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- o Charles Schwab SEP-IRA (Owner: SP)
- o Edward Jones IRA
- o IRA Rollover
- o K and A Family Limited Partnership  
LOCATION: Ontario, OR, US  
DESCRIPTION: 15.518% ownership
- o Moonriver LLC  
LOCATION: Ontario, OR, US
- o The Bentz Farm  
LOCATION: Ontario, OR, US
- o Yturri Rose Keough 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?

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:** Cliff Bentz , 01/25/2021