



Filing ID #10039768

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Mark Steven Robertson
Status: Congressional Candidate
State/District: NV03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 04/28/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CIT Bank Personal [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Loan to Campaign [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Personal loan to campaign					
Nevada State Bank [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
PacLife Aggressive Growth [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$201 - \$1,000
Roth IRA ⇒ CIT Bank [BA]		\$100,001 - \$250,000	Tax-Deferred		
Roth IRA ⇒ Commercial Office Building [RP]		\$1,000,001 - \$5,000,000	Tax-Deferred		
LOCATION: Henderson / Clark, NV, US					
SEP-IRA ⇒ Dividend Appreciation [EF]		\$15,001 - \$50,000	Tax-Deferred		
SEP-IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Emerging Markets [EF]					
SEP-IRA ⇒ Energy [EF]		\$1,001 - \$15,000	Tax-Deferred		
SEP-IRA ⇒ High Dividend Yield [EF]		\$1,001 - \$15,000	Tax-Deferred		
SEP-IRA ⇒ Inflation Protection [EF]		\$50,001 - \$100,000	Tax-Deferred		
SEP-IRA ⇒ Int'l High Div Yield [EF]		\$15,001 - \$50,000	Tax-Deferred		
SEP-IRA ⇒ Materials [EF]		\$1,001 - \$15,000	Tax-Deferred		
SEP-IRA ⇒ Real Estate Index [EF]		\$1,001 - \$15,000	Tax-Deferred		
SEP-IRA ⇒ S&P 500 [EF]		\$15,001 - \$50,000	Tax-Deferred		
SEP-IRA ⇒ S&P Mid Cap [EF]		\$1,001 - \$15,000	Tax-Deferred		
SEP-IRA ⇒ S&P Small Cap [EF]		\$1,001 - \$15,000	Tax-Deferred		
SEP-IRA ⇒ Small Cap Value [EF]		\$1,001 - \$15,000	Tax-Deferred		
SEP-IRA ⇒ Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Federal Savings Banks [BA]		\$100,001 - \$250,000	Interest	\$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
RDJ Financial Architects	Business Activities	\$39,500.00	\$283,906.00
Clark Country School District	Substitute Teacher	\$90.00	\$720.00
S.A.F.E. Management	Employment	\$100.00	\$3,664.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Sole Proprietor	RDJ Financial Architects
Substitute Teacher	Clark County School District
Security Manager	S.A.F.E. Management

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

◦ Roth IRA ◦ SEP-IRA
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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

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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: Mark Steven Robertson , 04/28/2021