



Filing ID #10040607

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Casey Wardynski
Status: Congressional Candidate
State/District: AL05

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 05/29/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brokerage Account 3 ⇒ iShare Gold Trust (IAU) [EF]		\$1,001 - \$15,000	None		
Brokerage Account 3 ⇒ iShares Silver Trust (SLV) [ET]		\$1,001 - \$15,000	None		
Checking Account 1 ⇒ USAA Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Checking Account 2 ⇒ Cadence Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Checking Account 3 ⇒ Compass Bank Checking Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Crypto Currency Account ⇒ Bitcoin (BTC) [OT] DESCRIPTION: Crypto Currency	JT	\$1,001 - \$15,000	Capital Gains	None	None
Crypto Currency Account ⇒ Bitcoin Cash (BCH) [OT] DESCRIPTION: Crypto Currency	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Crypto Currency Account ⇒ Ethereum (ETH) [OT]	JT	\$1,001 - \$15,000	Capital Gains	None	None
DESCRIPTION: Crypto Currency					
Fixed Annuity ⇒ NY Life Fixed Annuity 1 [FN]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Fixed Annuity ⇒ NY Life Fixed Annuity 2 [FN]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Life Insurance ⇒ NY Life Policy 2 [WU]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Life Insurance ⇒ NY Life Policy 3 [WU]	SP	\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Life Insurance ⇒ NY Life Policy 4 [WU]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Life Insurance ⇒ NY Life Policy 4 [WU]	SP	\$50,001 - \$100,000	Dividends	None	\$2,501 - \$5,000
Life Insurance ⇒ NY Life Policy 6 [WU]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Life Insurance ⇒ NY Life Policy 7 [WU]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Life Insurance ⇒ NY Life Policy 8 [WU]	SP	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Life Insurance ⇒ Physicians' Mutual Life Fixed Annuity [FN]	SP	\$1,001 - \$15,000	Interest	None	\$1 - \$200
Money Market Account ⇒ Cadence Bank Money Market [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	\$2,501 - \$5,000
DESCRIPTION: Money Market Account					
Retirement Account 1 ⇒ Cash [IH]		\$1 - \$1,000	Interest	None	\$1 - \$200
Retirement Account 1 ⇒ Midland National Life Annuity [FN]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement Account 2 ⇒ Cash [IH]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Retirement Account 2 ⇒ Navy Federal Credit Union CD [IH]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$2,501 - \$5,000
Savings Account 1 ⇒ USAA Bank Savings Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Spouse Retirement Account 1 ⇒ Blackrock Total Stock Market Index K [MF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Spouse Retirement Account 1 ⇒ Stable Value Fixed Income Fund [MF]	SP	\$15,001 - \$50,000	Dividends	None	\$1 - \$200
Spouse Retirement Account 2 ⇒ American FDS RET OPT 2025 [MF]	SP	\$15,001 - \$50,000	Dividends	None	\$1 - \$200
Spouse Retirement Account 2 ⇒ Transamerica Stable Core Option Money Market [MF]	SP	\$100,001 - \$250,000	Dividends	None	\$1 - \$200
Universal Life Insurance ⇒ Universal Life Insurance [WU]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$2,501 - \$5,000
US Bank Account 1 IRA ⇒ Navy Federal Credit Union CD [IH]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500

* 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
Regenesis Stem Cell Center	Salary	\$34,576.87	N/A
Pinnacle Behavioral Health	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Cadence Bank	2020	Mortgage	\$250,001 - \$500,000
SP	Bancorp South	2013	Mortgage	\$100,001 - \$250,000
SP	Compass Bank	2010	Loan	\$15,001 - \$50,000
JT	Cadence Bank	2020	Line of Credit	\$50,001 - \$100,000
JT	Cadence Bank	2020	Signature Loan	\$15,001 - \$50,000
JT	Cadence Bank	2021	Mortgage	\$100,001 - \$250,000
	USAA Bank	2020	Revolving Credit - Credit Card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Payment from Escrow Account for Sale of FISH Technologies (Addison , TX, US)	CEO of FISH Technologies in 2018.

SCHEDULE A ASSET CLASS DETAILS

◦ Brokerage Account 3 LOCATION: US ◦ Checking Account 1 LOCATION: US ◦ Checking Account 2 LOCATION: US ◦ Checking Account 3 (Owner: SP) LOCATION: US ◦ Crypto Currency Account (Owner: JT) LOCATION: US ◦ Fixed Annuity LOCATION: US

- Life Insurance (Owner: SP)
LOCATION: US
- Money Market Account
LOCATION: US
- Retirement Account 1
- Retirement Account 2
- Savings Account 1
LOCATION: US
- Spouse Retirement Account 1 (Owner: SP)
- Spouse Retirement Account 2 (Owner: SP)
- Universal Life Insurance
LOCATION: US
- US Bank Account 1 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: Casey Wardynski , 05/29/2021