



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: E. Benjamin Samuels
Status: Congressional Candidate
State/District: MO02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 11/29/2021
Period Covered: 01/01/2020– 11/5/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alphabet Inc. - Class A (GOOGL) [ST]		\$100,001 - \$250,000	None		
DESCRIPTION: Schwab Personal Brokerage					
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: Schwab Personal Brokerage					
American Funds Developing World Growth and Income (FDWGX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: Cap Group Investment Account - Personal Account					
Cash Balance [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Cash Balance [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Cash Balance [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Commonwealth of Massachusetts State Board of		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement [FN]					
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ American Funds New World Fund Inc - F3 (FNWFX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Citigroup, Inc. (C) [ST]		None	Capital Gains, Dividends	None	\$1,001 - \$2,500
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Devon Energy Corporation (DVN) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ DXC Technology Company (DXC) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Edward B Samuels Irrevocable Trust dtd 8/3/1998 - Cash Balance [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Europacific Growth Fd F3 (FEUPX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$2,501 - \$5,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Fundamental Investors Cl F3 (FUNFX) [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Hewlett Packard Enterprise Company (HPE) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ HP Inc. (HPQ) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒		None	Capital Gains, Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares Inc iShares MSCI Israel ETF (EIS) [EF]					
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ ITT Inc. (ITT) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ L3Harris Technologies, Inc. (LHX) [ST]		None	Capital Gains, Dividends	None	\$1,001 - \$2,500
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Regions Financial Corporation (RF) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ SCHWAB S&P 500 INDEX (SWPPX) [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ SCHWAB TOTAL STOCK MARKET INDEX (SWTSX) [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ SCHWAB VALUE ADVANTAGE MONEY INV (SWVXX) [MF]		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$1 - \$200
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Signature Bank (SBNY) [ST]		None	Capital Gains	None	\$201 - \$1,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ The Travelers Companies, Inc. (TRV) [ST]		None	Capital Gains, Dividends	None	\$2,501 - \$5,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Union Pacific Corporation (UNP) [ST]		\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$15,001 - \$50,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ UnitedHealth Group Incorporated Common Stock		\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(UNH) [ST]					
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ ViacomCBS Inc. - Class B (VIAC) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Waste Management, Inc. (WM) [ST]		None	Capital Gains, Dividends	None	\$1,001 - \$2,500
EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998 ⇒ Xylem Inc. Common Stock New (XYL) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Europacific Growth Fd F3 (FEUPX) [MF] DESCRIPTION: Cap Group Investment Account - Personal Account		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$201 - \$1,000
Factor Technology, Inc. [PS] DESCRIPTION: Investment in Factor Technologies, Inc.		\$1,001 - \$15,000	None		
Fundamental Investors Cl F3 (FUNFX) [MF] DESCRIPTION: Cap Group Investment Account - Personal Account		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$2,501 - \$5,000
General Electric Company (GE) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
HollyFrontier Corporation (HFC) [ST]		\$1 - \$1,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
IRA FBO Edward B Samuels ⇒ American Funds Developing World Growth and Income (FDWGX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA FBO Edward B Samuels ⇒ Europacific Growth Fd F3 (FEUPX) [MF]		\$1,001 - \$15,000	Dividends, Interest	\$201 - \$1,000	\$1 - \$200
IRA FBO Edward B Samuels ⇒ Fundamental Investors Cl F3 (FUNFX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA FBO Edward B Samuels ⇒ SmallCap World Fund Class F3 (SFCWX) [MF]		\$15,001 - \$50,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
IRA FBO Edward B Samuels ⇒		\$15,001 - \$50,000	Capital Gains,	\$201 - \$1,000	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
The Investment Company of America Class F3 (FFICX) [MF]			Dividends		\$1,000
iShares Gold Trust (IAU) [EF]		\$15,001 - \$50,000	Capital Gains	None	\$2,501 - \$5,000
DESCRIPTION: Schwab Personal Brokerage					
M+H Red Cedar Holdings LLC [HE]		\$15,001 - \$50,000	Distribution	\$201 - \$1,000	None
MGM Resorts International (MGM) [ST]		None	Capital Gains	None	\$201 - \$1,000
DESCRIPTION: Schwab Personal Brokerage					
New Perspective Fund Class F3 [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
DESCRIPTION: Cap Group Investment Account - Personal Account					
New World Fund Class F3 [MF]		\$100,001 - \$250,000	Dividends	None	\$201 - \$1,000
DESCRIPTION: Cap Group Investment Account - Personal Account					
Schwab Intl Index Fund (SWISX) [MF]		\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000
DESCRIPTION: Schwab Personal Brokerage					
Schwab S&P 500 Index Fund (SWPPX) [MF]		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
DESCRIPTION: Schwab Personal Brokerage					
Schwab Small Cap Index (SWSSX) [MF]		\$50,001 - \$100,000	None		
DESCRIPTION: Schwab Personal Brokerage					
Schwab Total Stock Mkt Index (SWTSX) [MF]		\$50,001 - \$100,000	Dividends	None	\$1,001 - \$2,500
DESCRIPTION: Schwab Personal Brokerage					
Schwab US Large Cap Growth Index Fund (SWLGX) [MF]		\$15,001 - \$50,000	Dividends	None	\$1 - \$200
DESCRIPTION: Schwab Personal Brokerage					
SCHWAB VALUE ADVANTAGE MONEY INV (SWVXX) [BA]		\$1 - \$1,000	Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SmallCap World Fund Class F3 (SFCWX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
DESCRIPTION: Cap Group Investment Account - Personal Account					
The Investment Company of America Class F3 (FFICX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Cap Group Investment Account - Personal Account					
The New Economy Fund Class F3 (FNEFX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
DESCRIPTION: Cap Group Investment Account - Personal Account					

* 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
Commonwealth of Massachusetts	Salary	\$44,674.50	\$115,000.00
Proton.ai	Contractor fees	\$25,556.00	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Operations Office	Office of the Mayor, City of Chicago
Director of Special Projects	Office of the Governor, Commonwealth of Massachusetts
Treasurer	Graduate Council, The Harvard Crimson

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- EDWARD B SAMUELS IRREVOCABLE TRUST DTD 8/3/1998
- IRA FBO Edward B Samuels
DESCRIPTION: ACG-123261

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: E. Benjamin Samuels , 11/29/2021