



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Mitchell Swan  
**Status:** Congressional Candidate  
**State/District:** GA10

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 08/12/2021  
**Period Covered:** 01/01/2020– 08/12/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Investments ⇒ AbbVie Inc. (ABBV) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ ALPS Clean Energy ETF (ACES) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ Altria Group, Inc. (MO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ Apple Inc. (AAPL) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Fidelity Investments ⇒ Bank of America Corporation (BAC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ Boeing Company (BA) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ CCF 5% bond 12.01.21 maturity [CS]	SP	\$15,001 - \$50,000	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>
DESCRIPTION: Cornerstone Charitable Foundation, taxable muni cusip #21925LEC1					
Fidelity Investments ⇒ CIM RE Fin Tr Inc Com [RE]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ DXC Technology Company (DXC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ Fidelity Cash Reserve [BA]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: interest earned is less than \$1.00/year					
Fidelity Investments ⇒ Fidelity Cash Reserve [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ Fidelity Govt Money Market [BA]	SP	\$50,001 - \$100,000	Tax-Deferred		
Fidelity Investments ⇒ Global X Robotics & Artificial Intelligence ETF (BOTZ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ Griffin Realty Trust Inc Class E [RE]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ iShares Silver Trust (SLV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ NIO Inc. American depositary shares, each representing one Class A ordinary share (NIO) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ ProShares UltraPro Short QQQ (SQQQ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ ProShares UltraShort S&P500 (SDS) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Investments ⇒ Sonos, Inc. (SONO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ Verizon Communications Inc. (VZ) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ Vertex Pharmaceuticals Incorporated (VRTX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ Xilinx, Inc. (XLNX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ Leslie Ferrone Trust ⇒ Bank of America Corporation (BAC) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity Investments ⇒ Leslie Ferrone Trust ⇒ Fidelity Government Money Market [MF]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Sapphire Wealth Management ⇒ Bank of America [BA]	SP	\$1,001 - \$15,000	Interest	None	None
DESCRIPTION: savings acct for SWM at Bank of America. The dollars earn \$.07/month					
Sapphire Wealth Management ⇒ Sapphire Wealth Management, 100% Interest [OL]	SP	\$100,001 - \$250,000	K-1 income	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
LOCATION: Watkinsville, GA, US					
DESCRIPTION: Income from K-1 reporting					

\* 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
Sapphire Wealth Management Inc	spouse salary	N/A	N/A
Sapphire Wealth Management Inc	spouse distribution	N/A	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Sapphire Wealth Management Inc	salary	\$15,000.00	\$30,000.00

#### SCHEDULE D: LIABILITIES

None disclosed.

#### SCHEDULE E: POSITIONS

Position	Name of Organization
Board member	AC Ministries

#### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

#### SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> <li>o Fidelity Investments (Owner: SP)</li> <li>o Fidelity Investments DESCRIPTION: Mitchell's IRA</li> <li>o Fidelity Investments ⇒ Leslie Ferrone Trust (100% Interest) (Owner: SP) DESCRIPTION: This is a living trust in name of Leslie Ferrone. Candidate has ZERO interest, control and is NOT a beneficiary.</li> <li>o Sapphire Wealth Management (100% Interest) (Owner: SP) LOCATION: Watkinsville, GA, US</li> </ul>
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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:** Mitchell Swan , 08/12/2021