



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Janelle Perez
Status: Congressional Candidate
State/District: FL27

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 09/30/2021
Period Covered: 01/01/2020– 08/31/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Citi Investor Account ⇒ AMERRA Agri Fund II LP [HE]		\$250,001 - \$500,000	Recallable Distribution	\$15,001 - \$50,000	\$2,501 - \$5,000
Citi Investor Account ⇒ Citi Money Market Deposit Account [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Doctors HealthCare Plans, Inc. [PS] DESCRIPTION: Medicare Health Plan, Coral Gables, FL		\$500,001 - \$1,000,000	None		
Doctors HealthCare Plans, Inc. 401k ⇒ Vanguard European Stock Index Fund Admiral Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
Doctors HealthCare Plans, Inc. 401k ⇒ Vanguard Total International Stock Index Fund Admiral Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
Doctors HealthCare Plans, Inc. 401k ⇒ Vanguard Total Stock Market Index Fund Admiral Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Scholars Choice College Savings Program ⇒ Scholars Choice 529 Age-Based 4-6 C [MF]		\$100,001 - \$250,000	Tax-Deferred		
Scholars Choice College Savings Program ⇒ Scholars Choice 529 Age-Based 4-6 O [MF]		\$15,001 - \$50,000	Tax-Deferred		
UBS Brokerage Account #1 ⇒ Anchorage Alaska Refunding Schs Series B [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	None
UBS Brokerage Account #1 ⇒ Beaumont Texas Waterworks And Sewer System Refunding Series A [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
UBS Brokerage Account #1 ⇒ Denton County Texas Tax Notes [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #1 ⇒ Garland Texas Water And Sewer Revenue Refunding [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
UBS Brokerage Account #1 ⇒ Indianapolis Industry Local Public Improvement Bond Bank Community Justice Campus Court Hse [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
UBS Brokerage Account #1 ⇒ Killeen Texas Independent School District School Building [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
UBS Brokerage Account #1 ⇒ Knox County Tennessee [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #1 ⇒ Massachusetts St Federal Highway Grant Anticipation Notes Series A [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #1 ⇒ New York New York Fiscal 2022 Subordinated Series A 1 [GS]		\$15,001 - \$50,000	None		
UBS Brokerage Account #1 ⇒ Tacoma Washington Sewer Revenue [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #1 ⇒ Temple Texas Refunding [GS]		\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #1 ⇒ UBS Bank USA [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #1 ⇒ Washington St Motor Vehicle Fuel Tax Series B 1 [GS]		None	Interest	\$201 - \$1,000	None
UBS Brokerage Account #1 ⇒ Washington St Various Purpose Series D [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
UBS Brokerage Account #1 ⇒ Washtenaw County Michigan Refunding Sylvan Township Water [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #1 ⇒ Waukesha Wisconsin Promissory Notes Series A [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
UBS Brokerage Account #2 ⇒ Abbott Laboratories (ABT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #2 ⇒ Adobe Inc. (ADBE) [ST]		\$15,001 - \$50,000	Capital Gains	None	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$15,001 - \$50,000	None		
UBS Brokerage Account #2 ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ AT&T Inc. (T) [ST]		None	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Campbell Soup Company (CPB) [ST]		None	Dividends	\$201 - \$1,000	\$1 - \$200
UBS Brokerage Account #2 ⇒ CME Group Inc. - Class A (CME) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Constellation Brands, Inc. (STZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #2 ⇒ CoreSite Realty Corporation (COR) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ DocuSign, Inc. (DOCU) [ST]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ Facebook, Inc. - Class A (FB) [ST]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #2 ⇒ Global X NASDAQ-100 Covered Call ETF (QYLD) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
UBS Brokerage Account #2 ⇒ Heico Corporation (HEI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Home Depot, Inc. (HD) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ International Business Machines Corporation (IBM) [ST]		None	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #2 ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ Keurig Dr Pepper Inc. (KDP) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ lululemon athletica inc. (LULU) [ST]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ MasTec, Inc. (MTZ) [ST]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
UBS Brokerage Account #2 ⇒ McCormick & Company, Incorporated (MKC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #2 ⇒ McDonald's Corporation (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
UBS Brokerage Account #2 ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
UBS Brokerage Account #2 ⇒ Morgan Stanley Finance T-SS MID [OT] DESCRIPTION: Structured Investment		\$15,001 - \$50,000	None		
UBS Brokerage Account #2 ⇒ Nestle SA Sponsored ADR representing Registered Shares Series B (NSRGY) [ST]		None	Dividends	None	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Netflix, Inc. (NFLX) [ST]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ O'Reilly Automotive, Inc. (ORLY) [ST]		None	Capital Gains	\$201 - \$1,000	None
UBS Brokerage Account #2 ⇒ PayPal Holdings, Inc. (PYPL) [ST]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ Pepsico, Inc. (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
UBS Brokerage Account #2 ⇒ Riverbridge Growth Fund Institutional Class (RIVBX) [MF]		None	Capital Gains	\$1,001 - \$2,500	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Salesforce.com Inc (CRM) [ST]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ SPDR Series Trust SPDR S&P Biotech ETF (XBI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Square, Inc. Class A (SQ) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Tandem Diabetes Care, Inc. (TNDM) [ST]		\$1,001 - \$15,000	None		
UBS Brokerage Account #2 ⇒ Thermo Fisher Scientific Inc (TMO) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #2 ⇒ Twitter, Inc. (TWTR) [ST]		None	Capital Gains	\$2,501 - \$5,000	None
UBS Brokerage Account #2 ⇒ UBS Bank USA [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #2 ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #2 ⇒ Veeva Systems Inc. Class A (VEEV) [ST]		None	Capital Gains	\$2,501 - \$5,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #2 ⇒ Volkswagen A G Ord Ordinary Shares (VLKPF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
UBS Brokerage Account #2 ⇒ Walmart Inc. (WMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
UBS Brokerage Account #2 ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
UBS Brokerage Account #2 ⇒ WCM Focused International Growth Fund Institutional Class (WCMIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Wellcare Health Plans, Inc. (WCG) [ST]		None	Capital Gains	None	\$1,001 - \$2,500
UBS Brokerage Account #2 ⇒ Zoetis Inc. Class A (ZTS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
UBS Brokerage Account #3 ⇒ BANK OF NOVA SCOTIA TA-CYN NDX [OT] DESCRIPTION: Structured Investment		None	Miscellaneous Income	None	\$201 - \$1,000
UBS Brokerage Account #3 ⇒ BARCLAYS BANK PLC L/O TA-CYN MXEF NDX RTY [OT] DESCRIPTION: Structured Investment		None	Miscellaneous Income	None	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #3 ⇒ BARCLAYS BANK PLC L/O TA-CYN MXEF NDX RTY [OT] DESCRIPTION: Structured Investment		None	Miscellaneous Income	None	\$201 - \$1,000
UBS Brokerage Account #3 ⇒ BARCLAYS BANK PLC L/O TC-CYN NDX RTY SPX [OT] DESCRIPTION: Structured Investment		None	Miscellaneous Income	None	\$201 - \$1,000
UBS Brokerage Account #3 ⇒ BOFA FINANCE LLC TA-CYN SPX [OT] DESCRIPTION: Structured Investment		None	Miscellaneous Income	None	\$201 - \$1,000
UBS Brokerage Account #3 ⇒ Citigroup Global Markets L/O TC-CYN MXEF SPX [OT] DESCRIPTION: Structured Investment		\$1,001 - \$15,000	Miscellaneous Income	\$201 - \$1,000	None
UBS Brokerage Account #3 ⇒ GS Finance Corp L/O T-SS RTY SPX [OT] DESCRIPTION: Structured Investment		\$15,001 - \$50,000	None		
UBS Brokerage Account #3 ⇒ JPMorgan Chase Financial CT-Gears Intl Basket [OT] DESCRIPTION: Structured Investment		\$15,001 - \$50,000	None		
UBS Brokerage Account #3 ⇒ Morgan Stanley Finance CT-Gears RTY [OT] DESCRIPTION: Structured Investment		\$15,001 - \$50,000	None		
UBS Brokerage Account #3 ⇒ Morgan Stanley Finance T-Gears SPX [OT] DESCRIPTION: Structured Investment		\$100,001 - \$250,000	None		
UBS Brokerage Account #3 ⇒ Morgan Stanley Finance T-SS MCXE [OT] DESCRIPTION: Structured Investment		\$15,001 - \$50,000	None		
UBS Brokerage Account #3 ⇒ UBS Bank USA [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #4 ⇒ ALABAMA ST C/A Series A [GS]		None	Interest	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #4 ⇒ ALPHA CENTRIC INCOME OPPORTUNITIES FUND CLASS I (IOFIX) [MF]		None	Dividends	None	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ American Century High Income Fund I Class (AHIIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ ANGEL OAK MULTI-STRATEGY INCOME FUND CLASS INSTL (ANGIX) [MF]		None	Dividends	None	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ First Trust Tactical High Yield ETF (HYLS) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ Florida St Refunding Department Transportation Right Of Way [GS]		None	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ Garland Texas Independent School District Refunding School Building Series A [GS]		None	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ iShares TIPS Bond ETF (TIP) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
UBS Brokerage Account #4 ⇒ Massachusetts St Refunding Series B [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ Massachusetts St Turnpike Authority Turnpike Revenue Series A [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ Miami Dade County Florida Aviation Series B [GS]		None	Interest	None	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ PORT ARTHUR TX Independent Schools [GS]		None	Interest	None	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ PORTLAND Oregon Sewer Systems Series A [GS]		None	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ San Antonio Texas Refunding And Improvement [GS]		None	Interest	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #4 ⇒ Texas St Prerefunded Refunding Public Finance Authority [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ UBS Bank USA [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #4 ⇒ Victory Floating Rate Fund Class Y (RSFYX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ Wisconsin St Series B [GS]		None	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
Doctors Healthcare Plans Inc.	Salary	\$20,800.00	\$50,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Citibank Credit Card	August 2021	Credit Card	\$15,001 - \$50,000
	City National Bank	February 2021	Line of Credit	\$100,001 - \$250,000
COMMENTS: Joint Line of Credit with father and brother.				

SCHEDULE E: POSITIONS

Position	Name of Organization
Treasurer	Martin & Sofia Perez Family Foundation Inc.
Contract Specialist	Doctors Healthcare Plans Inc.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- o Citi Investor Account
LOCATION: US
- o Doctors HealthCare Plans, Inc. 401k
- o Scholars Choice College Savings Program
LOCATION: FL
- o UBS Brokerage Account #1
LOCATION: US
- o UBS Brokerage Account #2
LOCATION: US
- o UBS Brokerage Account #3
LOCATION: US
- o UBS Brokerage Account #4
LOCATION: US

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: Janelle Perez , 09/30/2021