



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Jake Evans  
**Status:** Congressional Candidate  
**State/District:** GA06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 10/1/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset           | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|--------------------------|----------------|-------------------------------|-----------------------|
| 401k ⇒<br>FXAIX [EF]                             |       | \$50,001 -<br>\$100,000  | Dividends      | \$1,001 - \$2,500             | \$1,001 -<br>\$2,500  |
| 401k ⇒<br>SWPPX [EF]                             |       | \$100,001 -<br>\$250,000 | Dividends      | \$2,501 - \$5,000             | \$1,001 -<br>\$2,500  |
| Roth IRA ⇒<br>3M Company (MMM) [ST]              |       | \$1,001 - \$15,000       | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |
| Roth IRA ⇒<br>AT&T Inc. (T) [ST]                 |       | \$1,001 - \$15,000       | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |
| Roth IRA ⇒<br>Boeing Company (BA) [ST]           |       | \$1,001 - \$15,000       | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |
| Roth IRA ⇒<br>ConocoPhillips (COP) [ST]          |       | \$1,001 - \$15,000       | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |
| Roth IRA ⇒<br>Duke Energy Corporation (DUK) [ST] |       | \$1,001 - \$15,000       | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |
| Roth IRA ⇒                                       |       | \$1,001 - \$15,000       | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |

| <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> |
|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Ford Motor Company (F) [ST]                               |              |                       |                       |                                      |                              |
| Roth IRA ⇒<br>General Electric Company (GE) [ST]          |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>Invesco QQQ Trust, Series 1 (QQQ) [ST]      |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>Johnson & Johnson (JNJ) [ST]                |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>JP Morgan Chase & Co. (JPM) [ST]            |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>Kimberly-Clark Corporation (KMB) [ST]       |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>Kinder Morgan, Inc. (KMI) [ST]              |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>McDonald's Corporation (MCD) [ST]           |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>Philip Morris International Inc (PM) [ST]   |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>Procter & Gamble Company (PG) [ST]          |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>Target Corporation (TGT) [ST]               |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>Vanguard High Dividend Yield ETF (VYM) [ST] |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>VIG [EF]                                    |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>VNQ [EF]                                    |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Roth IRA ⇒<br>VWO [EF]                                    |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |

| <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> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Roth IRA ⇒<br>Wells Fargo & Company (WFC) [ST]                         |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>AFIFX [EF]                             |              | \$15,001 - \$50,000   | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>American Express Company (AXP) [ST]    |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>ANCFX [EF]                             |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Apple Inc. (AAPL) [ST]                 |              | \$15,001 - \$50,000   | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Bank of America Corporation (BAC) [ST] |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>BP p.l.c. (BP) [ST]                    |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>CAIBX [EF]                             |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Chevron Corporation (CVX) [ST]         |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>CIBFX [EF]                             |              | \$15,001 - \$50,000   | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>CVS Health Corporation (CVS) [ST]      |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Delta Air Lines, Inc. (DAL) [ST]       |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Dow Inc. (DOW) [ST]                    |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>DuPont de Nemours, Inc. (DD) [ST]      |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Emerson Electric Company (EMR) [ST]    |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |

| <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> |
|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Standard Brokerage Account ⇒<br>Facebook, Inc. - Class A (FB) [ST]      |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>General Motors Company (GM) [ST]        |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Gilead Sciences, Inc. (GILD) [ST]       |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>GlaxoSmithKline PLC (GSK) [ST]          |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Microsoft Corporation (MSFT) [ST]       |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Nike, Inc. (NKE) [ST]                   |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Norfolk Southern Corporation (NSC) [ST] |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>QQQ [EF]                                |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>SGENX [EF]                              |              | \$15,001 - \$50,000   | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Southwest Airlines Company (LUV) [ST]   |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Starbucks Corporation (SBUX) [ST]       |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>VFIAX [EF]                              |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>Visa Inc. (V) [ST]                      |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒<br>VTI [EF]                                |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| Standard Brokerage Account ⇒  |              | \$1,001 - \$15,000    | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |

| Asset   | Owner | Value of Asset     | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|--------------------|----------------|-------------------------------|-----------------------|
| VYM [EF]  |       |                    |                |                               |                       |
| Standard Brokerage Account ⇒ Walt Disney Company (DIS) [ST] |       | \$1,001 - \$15,000 | Dividends      | \$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 |
|------------------|-------------|-------------------------------|-----------------------|
| Holland & Knight | Primary Job | \$260,000.00                  | \$360,000.00          |

### SCHEDULE D: LIABILITIES

| Owner | Creditor    | Date Incurred | Type     | Amount of Liability     |
|-------|-------------|---------------|----------|-------------------------|
| JT    | Wells Fargo | June 2021     | Mortgage | \$500,001 - \$1,000,000 |

### SCHEDULE E: POSITIONS

| Position                   | Name of Organization                    |
|----------------------------|---|
| Executive Board Member     | Republican National Lawyers Association |
| Advisory Council           | Atlanta Ballet                          |
| Georgia Advisory Committee | U.S. Commission on Civil Rights         |

### 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 401k</li> <li>o Roth IRA</li> </ul> |
|--|

- Standard Brokerage Account  
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:** Jake Evans , 10/1/2021