



Filing ID #10043969

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Courtney Joele Geels
Status: Congressional Candidate
State/District: NC13

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 11/9/2021
Period Covered: 01/01/2020– 11/9/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity IRA - Bryan ⇒ Alteryx, Inc. Class A (AYX) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	None	None
Fidelity IRA - Bryan ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity IRA - Bryan ⇒ Discover Financial Services (DFS) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	\$1,001 - \$2,500
Fidelity IRA - Bryan ⇒ FBGRX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity IRA - Bryan ⇒ FCPGX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity IRA - Bryan ⇒ FLPSX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends,	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
			Interest		
Fidelity IRA - Bryan ⇒ IonQ, Inc. (IONQ) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	None
Fidelity IRA - Bryan ⇒ IVV [EF]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
Fidelity IRA - Bryan ⇒ MPLX LP Common Units Representing Limited Partner Interests (MPLX) [ST]		\$1 - \$1,000	Capital Gains, Interest	\$201 - \$1,000	None
Fidelity IRA - Bryan ⇒ UiPath, Inc. Class A (PATH) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	None	None
Fidelity IRA - Bryan ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	None	\$201 - \$1,000
Fidelity IRA - Bryan ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	None
Fidelity IRA - Courtney ⇒ FDEEX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$201 - \$1,000
Fidelity IRA - Courtney ⇒ MPLX LP Common Units Representing Limited Partner Interests (MPLX) [ST]		\$1 - \$1,000	Capital Gains, Dividends, Interest	\$1 - \$200	Not Applicable
Fidelity IRA - Courtney ⇒ UiPath, Inc. Class A (PATH) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	Not Applicable
NCSECU Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
NCSECU Money Market [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
NCSECU Share [BA]	JT	\$1 - \$1,000	Interest	None	None
Real Estate ⇒	JT	\$100,001 -	Rent	\$15,001 -	\$15,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
2br/2bath condo [RP] LOCATION: Cary/Wake, NC, US DESCRIPTION: Rental property		\$250,000		\$50,000	\$50,000
Real Estate ⇒ 3br/2.5bath condo [RP] LOCATION: Raleigh/wake, NC, US DESCRIPTION: rental property	JT	\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Real Estate ⇒ primary residence/income property [RP] LOCATION: Durham/Durham, NC, US DESCRIPTION: purchased home in April 2021; have rented part of property since July 2021; spending more on property than bringing in in rent as this is our primary residence. Rent = \$2800 (we are paying mortgage/insurance/utilities/renovations for additional living space).	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	None
Robinhood -Bryan ⇒ Kinder Morgan, Inc. (KMI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	Not Applicable
Robinhood -Bryan ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Robinhood-Courtney ⇒ Boeing Company (BA) [ST]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	None
Robinhood-Courtney ⇒ Ford Motor Company (F) [ST]		\$1 - \$1,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
VALIC - WakeMed Retirement - Courtney ⇒ VWENX [MF]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	\$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
Geels Norton LLC	Spouse Salary	\$300,000.00	N/A
Geels Consulting	Spouse Salary	\$30,000.00	N/A
Swedish Medical Center	Nursing	\$26,000.00	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Aya Travel Nursing	Nursing	\$16,000.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	NCSECU	April 2021	Mortgage on property	\$250,001 - \$500,000
SP	NCSECU	December 2016	Mortgage on rental property	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

None disclosed.

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"> o Fidelity IRA - Bryan o Fidelity IRA - Courtney o Real Estate (Owner: JT) LOCATION: NC, US o Robinhood -Bryan LOCATION: US o Robinhood-Courtney LOCATION: US o VALIC - WakeMed Retirement - Courtney
--

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

COMMENTS

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: Courtney Joele Geels , 11/9/2021