



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Kathleen Harder
Status: Congressional Candidate
State/District: ORo6

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 03/15/2022
Period Covered: 01/01/2021– 02/28/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Arvest Bank [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Equitable Brokerage Account ⇒ Fidelity Advisor Consumer Staples Cl A [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Equitable Brokerage Account ⇒ Fidelity Advisor Health Care Cl A [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Equitable Brokerage Account ⇒ Fidelity Advisor Industrials Cl A [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1 - \$200
Equitable Brokerage Account ⇒ Fidelity Advisor New Insights Cl A [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Equitable Brokerage Account ⇒ FS KKR Capital Corp. (FSK) [ST]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Equitable Brokerage Account ⇒ FS KKR Capital Corp. II (FSKR) [ST]	JT	None	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Equitable Brokerage Account ⇒ Realty Income Corporation (O) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	None
Equitable Brokerage Account ⇒ VEREIT, Inc. (VER) [ST]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Equitable IRA FBO Robert Harder ⇒ Corporate Property Associates 18 Global Cl A [RE]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ American Balanced Fund Cl F2 [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Cash and equivalents [BA]		\$1,001 - \$15,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Columbia Balanced Institutional Cl [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Columbian Contrarian Core Fund Institutional Cl [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ First Eagle Global Fund Cl I [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Janus Henderson Enterprise Fund Cl T [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ PGIM Jennison Health Sciences Fund Cl Z [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ SPDR S&P 500 (SPY) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Vanguard Wellesley Income Fund Admiral Cl [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ American Balanced Fund Cl F2 [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Cash and equivalents [BA]	SP	\$50,001 - \$100,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Columbia Balanced Institutional Cl [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Equitable Rollover IRA FBO Robert Harder ⇒ Fidelity Advisor Health Care Fund Cl A [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ First Eagle Global Fund Cl I [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Hartford Capital Appreciation Fund Cl A [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Janus Henderson Enterprise Fund Cl T [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ SPDR S&P 500 (SPY) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Vanguard Wellesley Income Fund Admiral Cl [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ 1290 VT GAMCO Small Company Value Portfolio [MF]		\$50,001 - \$100,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ Cash and equivalents [BA]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ Delaware Ivy Asset Strategy Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ Delaware Ivy VIP High Income Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ EQ/Fidelity Institutional AM Large Cap Portfolio [MF]		\$50,001 - \$100,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ EQ/Franklin Strategic Income Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ Templeton Global Bond VIP Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ Cash and equivalents [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Equitable Variable Annuity 1 - Robert Harder ⇒ Delaware Ivy VIP Asset Strategy Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ Delaware Ivy VIP High Income Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ EQ/Equity 500 Index Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ EQ/Fidelity Institutional AM Large Cap Portfolio [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ EQ/Franklin Strategic Income Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ EQ/Large Cap Growth Index Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ Fidelity VIP Strategic Income Portfolio [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ Templeton Global Bond VIP Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ 1290 VT GAMCO Small Company Value Portfolio [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ Cash and equivalents [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ Delaware Ivy VIP High Income Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ EQ/MFS Utilities Series Portfolio [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ Fidelity VIP Strategic Income Portfolio [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ Templeton Global Bond VIP Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Equitable Variable Annuity 3 - Robert Harder ⇒ Equitable Russell 2000 5-year Structured Investment Option Annuity Contract [OT] DESCRIPTION: Structured Investment Option	SP	\$50,001 - \$100,000	Tax-Deferred		
Equitable Variable Annuity 3 - Robert Harder ⇒ Equitable S&P 500 5-year Structured Investment Option Annuity Contract [OT] DESCRIPTION: Structured Investment Option	SP	\$50,001 - \$100,000	Tax-Deferred		
Hall Phoenix/Inwood Ltd. [RP] LOCATION: Dallas, TX, US DESCRIPTION: Company holding commercial real estate in Dallas, TX.	JT	Undetermined	Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Hall Wines of Napa, LP [OL] LOCATION: Dallas, TX, US DESCRIPTION: Winery	JT	\$1,001 - \$15,000	None		
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ CIM Real Estate Finance Trust Inc. [RE]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ Columbia Tax Exempt Cl A [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ Corporate Property Associates 18 Global Cl A [RE]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ Invesco Ltd Term Mun Income Cl A [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ KBS Real Estate Investment Trust III Inc. [RE]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Pioneer Trust Bank [BA]	JT	\$100,001 - \$250,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Salem Clinic 401(k) ⇒ Morley Stable Value Fund Cl 25-I [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
Salem Clinic 401(k) ⇒		\$100,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Total Market Index Fund [MF]		\$250,000			
Salem Clinic 401(k) - SP ⇒ Baird Aggregate Bond Fund Institutional [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Salem Clinic 401(k) - SP ⇒ Principal Real Estate Securities Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Salem Clinic 401(k) - SP ⇒ Vanguard Total Stock Market Index Fund [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
Sono LLC [OL]	JT	\$500,001 - \$1,000,000	Partnership income	\$50,001 - \$100,000	\$50,001 - \$100,000
LOCATION: Salem, OR, US DESCRIPTION: Owns real estate and equipment for Salem Clinic PC, a medical office.					
TCB Real Estate Investments, LLC [RP]	SP	\$50,001 - \$100,000	Partnership income	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Weatherford, OK, US DESCRIPTION: Company holding commercial real estate.					
Teocalli Exploration, LLC [RP]	SP	Undetermined	Royalties	\$1 - \$200	\$1 - \$200
LOCATION: Oklahoma City, OK, US DESCRIPTION: Holds oil well.					

* 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
Oregon Medical Board	salary	\$6,075.00	\$5,488.00
Intuitive Surgical Inc.	spouse consulting fee	N/A	N/A
Salem Clinic PC	spouse salary	N/A	N/A
Salem Clinic PC	salary	\$155,207.00	\$126,357.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Sono LLC
Member	Jumping Spider Holdings, LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Equitable Brokerage Account (Owner: JT)
LOCATION: US
- Equitable IRA FBO Robert Harder (Owner: SP)
- Equitable Rollover IRA FBO Kathleen Harder
- Equitable Rollover IRA FBO Robert Harder (Owner: SP)
- Equitable Variable Annuity - Kathleen Harder
- Equitable Variable Annuity 1 - Robert Harder (Owner: SP)
- Equitable Variable Annuity 2 - Robert Harder (Owner: SP)
- Equitable Variable Annuity 3 - Robert Harder (Owner: SP)
- Jumping Spider Holdings, LLC (Owner: JT)
LOCATION: Salem, OR, US
- Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account (Owner: JT)
LOCATION: US
- Salem Clinic 401(k)
- Salem Clinic 401(k) - SP (Owner: SP)

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: Kathleen Harder , 03/15/2022