



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Elizabeth Caruso
Status: Congressional Candidate
State/District: ME02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 03/2/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bangor Checking [BA]	JT	\$1,001 - \$15,000	None		
Bangor checking bus [BA]	JT	\$1,001 - \$15,000	None		
Camaden Savings [BA]	JT	\$15,001 - \$50,000	None		
Camden checking [BA]	JT	\$1,001 - \$15,000	None		
Camden Checking [BA]	JT	\$1,001 - \$15,000	None		
Educational DC1 ⇒ Fcash [IH]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC1 ⇒ GLD [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC1 ⇒ IVV [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC1 ⇒ JABAX [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Educational DC1 ⇒ Merrill Educational DC1 ⇒ MGRAN, 100% Interest [OT] DESCRIPTION: matching grant	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC1 ⇒ Merrill Educational DC1 ⇒ NAAHQ [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC1 ⇒ Merrill Educational DC1 ⇒ NAAHR [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC1 ⇒ Merrill Educational DC1 ⇒ NGADT [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC1 ⇒ Merrill Educational DC1 ⇒ NGDDT [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC2 ⇒ Fcash [IH]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC2 ⇒ GLD [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC2 ⇒ IVV [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC2 ⇒ JABAX [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC2 ⇒ Merrill Educational DC2 ⇒ AZJWA [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC2 ⇒ Merrill Educational DC2 ⇒ MGRAN, 100% Interest [OT] DESCRIPTION: matching grant	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC2 ⇒ Merrill Educational DC2 ⇒ NAAHQ [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Educational DC2 ⇒ Merrill Educational DC2 ⇒ NAAHR [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Educational DC2 ⇒ Merrill Educational DC2 ⇒ NGDDT [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ Enterprise Prods Partnership [IH]		\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ FDRXX [IH]		\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ GLD [EF]		\$15,001 - \$50,000	Tax-Deferred		
Roth ⇒ IVV [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ JABAX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ OPGSX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ RPM International Inc. (RPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Spouse IRA ⇒ Intermediate Bond Fund of America [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse IRA ⇒ New Economy Fund A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Traditional ⇒ Fidelity Traditional [IH]		\$1,001 - \$15,000	None		

* 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
Town of Caratunk	elected positions		\$12,800.00
Northern Outdoors Rafting	guide work		\$2,529.15
TaxPro	worked	\$.00	\$3,447.31
No CMP Corridor	subcontractor	\$.00	\$5,884.68
Revolution Field Strategies	subcontractor	\$.00	\$5,274.72
Appalachian Trail Conservancy	spouse, LLC		\$33,000.00
Kennebec River Angler	spouse, fishing guide		\$2,970.00
Sugarloaf Mountain	spouse job	\$.00	\$4,620.00
Northern Outdoors	spouse job	\$.00	\$3,896.68
Northern Outdoors Rafting	spouse job	\$.00	\$1,017.41
Unemployment	spouse	\$.00	\$160.00
Moose River Lumber Company	spouse	\$2,000.00	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
First Selectman	Town of Caratunk

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 Educational DC1 (Owner: JT)
LOCATION: ME
DESCRIPTION: Custodial with DC1

- Educational DC1 ⇒ Merrill Educational DC1 (Owner: JT)
LOCATION: ME
- Educational DC2 (Owner: JT)
LOCATION: ME
DESCRIPTION: Custodial with DC2
- Educational DC2 ⇒ Merrill Educational DC2 (Owner: JT)
LOCATION: ME
- Roth
DESCRIPTION: Fidelity Roth
- Spouse IRA (Owner: SP)
- Traditional
DESCRIPTION: Fidelity traditional

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: Elizabeth Caruso , 03/2/2022