



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Bill Spinney
Status: Congressional Candidate
State/District: CA41

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 12/16/2021
Period Covered: 01/01/2020– 11/30/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Citi Bank ⇒ Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Dodge & Cox (Inherited IRA) ⇒ Dodge & Cox International Stock Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Dodge & Cox (IRA) ⇒ Dodge & Cox International Stock Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity ⇒ Fidelity 500 Index [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity ⇒ Fidelity Emerging Markets Index [MF]		None	Capital Gains, Dividends	\$2,501 - \$5,000	\$201 - \$1,000
Fidelity ⇒ Fidelity International Index [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity ⇒ Fidelity Limited Term Bond Fund [GS]		\$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
Fidelity ⇒ Fidelity Mid Cap Index [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity ⇒ Fidelity Small Cap Index [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity ⇒ Fidelity Treasury Money Market Fund [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity (Health Savings Account) ⇒ Fidelity 500 Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity (Health Savings Account) ⇒ Fidelity Emerging Markets Index [MF]		\$1 - \$1,000	Tax-Deferred		
Fidelity (Health Savings Account) ⇒ Fidelity International Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity (Health Savings Account) ⇒ Fidelity Limited Term Bond Fund [GS]		\$1 - \$1,000	Tax-Deferred		
Fidelity (Health Savings Account) ⇒ Fidelity Mid Cap Index [MF]		\$1 - \$1,000	Tax-Deferred		
Fidelity (Health Savings Account) ⇒ Fidelity Small Cap Index [MF]		\$1 - \$1,000	Tax-Deferred		
Fidelity (Health Savings Account) ⇒ Fidelity Treasury Money Market Fund [BA]		\$1 - \$1,000	Tax-Deferred		
Fidelity (Health Savings Account) ⇒ Vanguard Whitehall High Dividend Yield [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity (Inherited IRA) ⇒ Fidelity 500 Index [MF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity (Inherited IRA) ⇒ Fidelity Emerging Markets Index [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity (Inherited IRA) ⇒ Fidelity International Index [MF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity (Inherited IRA) ⇒ Fidelity Limited Term Bond Fund [GS]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity (Inherited IRA) ⇒ Fidelity Mid Cap Index [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity (Inherited IRA) ⇒ Fidelity Small Cap Index [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity (Inherited IRA) ⇒ Fidelity Treasury Money Market Fund [BA]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity (Inherited IRA) ⇒ SPDR GOLD TRUST GOLD SHARES [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity (Inherited IRA) ⇒ Vanguard Whitehall High Dividend Yield [EF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity (IRA) ⇒ Fidelity 500 Index [MF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity (IRA) ⇒ Fidelity Emerging Markets Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity (IRA) ⇒ Fidelity International Index [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity (IRA) ⇒ Fidelity Limited Term Bond Fund [GS]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity (IRA) ⇒ Fidelity Mid Cap Index [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity (IRA) ⇒ Fidelity Small Cap Index [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity (IRA) ⇒ Fidelity Treasury Money Market Fund [BA]		\$15,001 - \$50,000	Tax-Deferred		
Rental Property ; Tustin, CA [RP]		None	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Tustin, CA, US DESCRIPTION: Property sold May, 2021					
Schools First Federal Credit Union ⇒ Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TD Ameritrade ⇒ Anheuser-Busch Inbev SA Sponsored ADR (BUD) [ST]		None	Capital Gains, Dividends	\$1,001 - \$2,500	\$1 - \$200
TD Ameritrade ⇒ BP p.l.c. (BP) [ST]		None	Dividends	None	\$201 - \$1,000
TD Ameritrade ⇒ Chevron Corporation (CVX) [ST]		None	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000
TD Ameritrade ⇒ Constellation Brands, Inc. (STZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TD Ameritrade ⇒ Diageo plc (DEO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TD Ameritrade ⇒ Diamondback Energy, Inc. - Common Stock (FANG) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
TD Ameritrade ⇒ Franco-Nevada Corporation (FNV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
TD Ameritrade ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TD Ameritrade ⇒ Moderna, Inc. (MRNA) [ST]		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	None
COMMENTS: Sold partial stake 8/4/21 for capital gain.					
TD Ameritrade ⇒ Morgan Stanley (MS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TD Ameritrade ⇒ Parsley Energy, Inc. Class A (PE) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
TD Ameritrade ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TD Ameritrade ⇒ Uber Technologies, Inc. (UBER) [ST]		\$1,001 - \$15,000	None		
TD Ameritrade ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VanEck Gold Miners ETF (GDX) [EF]					
TD Ameritrade ⇒ VanEck Junior Gold Miners ETF (GDXJ) [EF]		\$1,001 - \$15,000	None		
TD Ameritrade ⇒ Wells Fargo & Company (WFC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard ⇒ 3M Company (MMM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$15,001 - \$50,000	None		
Vanguard ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard ⇒ Match Group, Inc. (MTCH) [ST]		\$1,001 - \$15,000	None		
Vanguard ⇒ Meta Platforms, Inc. - Class A (FB) [ST]		\$1,001 - \$15,000	None		
Vanguard ⇒ SPDR GOLD TRUST GOLD SHARES [EF]		\$15,001 - \$50,000	None		
Vanguard ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard ⇒ Vanguard Developed Markets Index [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard ⇒ Vanguard Emerging Markets Index [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard ⇒ Vanguard Federal Money Market [BA]		\$250,001 - \$500,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
Vanguard ⇒ Vanguard High Dividend Yield Index [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Vanguard ⇒ Vanguard Mid Cap Index [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard ⇒ Vanguard S&P 500 Index [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard ⇒ Vanguard Short Term Investment Grade Bond [GS]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Vanguard Short Term Investment Grade Bond					
Vanguard ⇒ Vanguard Short Term Treasury Inflation Protected Securities [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
DESCRIPTION: Vanguard Short Term Treasury Inflation Protected Securities					
Vanguard ⇒ Vanguard Small Cap Index [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard ⇒ Vanguard Total International Stock Index [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard (Inherited IRA / Inherited Roth IRA) ⇒ SPDR GOLD TRUST GOLD SHARES [EF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard (Inherited IRA / Inherited Roth IRA) ⇒ Vanguard Dividend Growth Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard (Inherited IRA / Inherited Roth IRA) ⇒ Vanguard Federal Money Market [BA]		\$250,001 - \$500,000	Tax-Deferred		
Vanguard (Inherited IRA / Inherited Roth IRA) ⇒ Vanguard High Dividend Yield Index [MF]		\$50,001 - \$100,000	Tax-Deferred		
Vanguard (Inherited IRA / Inherited Roth IRA) ⇒ Vanguard S&P 500 Index [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard (Inherited IRA / Inherited Roth IRA) ⇒ Vanguard Short Term Investment Grade Bond [CS]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Vanguard Short Term Investment Grade Bond					
Vanguard (Inherited IRA / Inherited Roth IRA)		\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
⇒ Vanguard Short Term Treasury Inflation Protected Securities [GS]		\$100,000			
Vanguard (Inherited IRA / Inherited Roth IRA) ⇒ Vanguard Total International Stock Index [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard (Roth IRA) ⇒ Vanguard Developed Markets Index [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard (Roth IRA) ⇒ Vanguard Emerging Markets Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard (Roth IRA) ⇒ Vanguard High Dividend Yield Index [MF]		\$100,001 - \$250,000	Tax-Deferred		
Vanguard (Roth IRA) ⇒ Vanguard Mid Cap Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard (Roth IRA) ⇒ Vanguard S&P 500 Index [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard (Roth IRA) ⇒ Vanguard Short Term Investment Grade Bond [CS] DESCRIPTION: Vanguard Short Term Investment Grade Bond		\$50,001 - \$100,000	Tax-Deferred		
Vanguard (Roth IRA) ⇒ Vanguard Short Term Treasury Inflation Protected Securities [GS]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard (Roth IRA) ⇒ Vanguard Small Cap Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard (Roth IRA) ⇒ Vanguard Total International Stock Index [MF]		\$1,001 - \$15,000	Tax-Deferred		

* 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
Harmony Home Health Care	Spouse Salary	N/A	N/A
Fidelity (Inherited IRA)	Distribution	\$21,640.52	\$21,289.32
Dodge & Cox (Inherited IRA)	Distribution	\$272.58	\$919.41
Vanguard (Inherited IRA / Inherited Roth IRA)	Distribution	\$26,977.61	\$28,114.08

SCHEDULE D: LIABILITIES

None disclosed.

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

- o Citi Bank
LOCATION: US
- o Dodge & Cox (Inherited IRA)
- o Dodge & Cox (IRA)
- o Fidelity
LOCATION: US
- o Fidelity (Health Savings Account)
- o Fidelity (Inherited IRA)
- o Fidelity (IRA)
- o Schools First Federal Credit Union
LOCATION: US
- o TD Ameritrade
LOCATION: US
- o Vanguard
LOCATION: US
- o Vanguard (Inherited IRA / Inherited Roth IRA)
- o Vanguard (Roth IRA)

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: Bill Spinney , 12/16/2021