



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Andy Yates
Status: Congressional Candidate
State/District: AZ01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 04/9/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Betterment Core Portfolio [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ BP p.l.c. (BP) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Roth IRA ⇒ Roth IRA [IH]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Traditional IRA ⇒ Betterment Core Portfolio [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$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
DAI ESOP inc	Salary	\$114,170.33	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Forage Arizona	Spouse Salary	\$49,024.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Great Lakes	August 2017	Student Loans	\$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

- Roth IRA
- Traditional 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: Andy Yates , 04/9/2022