



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Andrew Kalloch  
**Status:** Congressional Candidate  
**State/District:** OR04

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 01/12/2022  
**Period Covered:** 01/01/2021– 01/9/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
457(b) Oregon Growth Savings Plan ⇒ BlackRock Russell 1000 Growth Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
529 #1 ⇒ Vanguard Total Stock Market Index Fund Institutional Plus [MF]		\$50,001 - \$100,000	Tax-Deferred		
529 #2 ⇒ Vanguard Total Stock Market Index Fund Institutional Plus [MF]		\$15,001 - \$50,000	Tax-Deferred		
529 #3 ⇒ Vanguard Total Stock Market Index Fund Institutional Plus [MF]		\$15,001 - \$50,000	Tax-Deferred		
Airbnb, Inc. 401K ⇒ Fidelity 500 Index [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Airbnb, Inc. 401K ⇒ TRowe Price Blue Chip Growth I [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	None	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital One Savings [BA]		\$15,001 - \$50,000	Interest	None	\$1 - \$200
Chase Checking [BA]		\$15,001 - \$50,000	None		
Citi Savings [BA]		\$15,001 - \$50,000	Interest	None	\$1 - \$200
Health Savings Account ⇒ Vanguard Growth Index Institutional [MF]		\$1,001 - \$15,000	Tax-Deferred		
I-Bonds ⇒ I-Bonds [GS]		\$1,001 - \$15,000	None		
Inherited IRA ⇒ Vanguard 500 Index Fund Admiral [MF]		\$15,001 - \$50,000	Tax-Deferred		
Inherited IRA ⇒ Vanguard Growth Index Fund Admiral [MF]		\$1,001 - \$15,000	Tax-Deferred		
Investment Account ⇒ Airbnb, Inc. - Class A (ABNB) [ST]		\$250,001 - \$500,000	Capital Gains	None	\$15,001 - \$50,000
Investment Account ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]		\$15,001 - \$50,000	None		
Investment Account ⇒ Fundrise [RE]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
Investment Account ⇒ Fundrise "Internet Public Offering" [PS]		\$1,001 - \$15,000	None		
DESCRIPTION: This is an illiquid investment in the Rise Companies Corp., the parent company of Fundrise. The asset would become valuable only upon a liquidity event, such as an Initial Public Offering on a stock exchange. For more information, see: <a href="https://fundrise.com/help/articles/360032432432-How-do-I-make-money-by-investing-in-the-iPO">https://fundrise.com/help/articles/360032432432-How-do-I-make-money-by-investing-in-the-iPO</a>					
Investment Account ⇒ Vanguard Federal Money Market Fund [BA]		\$1 - \$1,000	None		
Metlife Whole Life Policy [WU]		\$15,001 - \$50,000	None		
Roth IRA #1 ⇒ Apple Inc. (AAPL) [ST]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA #2 ⇒ Vanguard 500 Index Fund Admiral [MF]		\$50,001 - \$100,000	Tax-Deferred		
Roth IRA #2 ⇒ Vanguard Emerging Markets Stock Index Fund Admiral [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA #2 ⇒ Vanguard Growth Index Fund Admiral [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA #2 ⇒ Vanguard Total Bond Market Index Fund Admiral [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA #1 ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA #1 ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA #1 ⇒ Salesforce.com Inc (CRM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA #2 ⇒ Vanguard U.S. Growth Fund Investor [MF]		\$15,001 - \$50,000	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
Airbnb, Inc.	Employment		\$575,900.00
University of Oregon	Spouse Salary	N/A	\$94,750.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	City Club of Eugene
Board Member	City Club of Portland

### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

### SCHEDULE A ASSET CLASS DETAILS

- 457(b) Oregon Growth Savings Plan
- 529 #1  
LOCATION: OR
- 529 #2  
LOCATION: OR
- 529 #3  
LOCATION: OR
- Airbnb, Inc. 401K
- Health Savings Account  
LOCATION: US
- I-Bonds  
LOCATION: US
- Inherited IRA
- Investment Account  
LOCATION: US
- Roth IRA #1
- Roth IRA #2
- Traditional IRA #1
- Traditional IRA #2

### 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:** Andrew Kalloch , 01/12/2022