



Filing ID #10044390

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Valerie Hoyle  
**Status:** Congressional Candidate  
**State/District:** OR04

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 01/21/2022  
**Period Covered:** 01/01/2020– 12/31/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
457 Retirement Account ⇒ Vanguard Instl Tgt Retire 2040 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investment ⇒ AS SPL Mid CAP Val R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investment ⇒ Dodge & Cox Intl Stk [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investment ⇒ NB Mid Cap Grth Inst [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investment ⇒ TRP Blue Chip Grth I [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Fidelity Investment ⇒ Vang MidCap IDx ADM [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investment ⇒ Vang Smcp GR Idx ADM [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Fidelity Investment ⇒ Vang Value Idx ADM [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investment ⇒ Vanguard Inst Index [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investment ⇒ WF Stable Fund C [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Merrill Edge IRA ⇒ IIAXX BANK OF AMERICA, NA RASP [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Edge IRA ⇒ Pure Storage, Inc. Class A (PSTG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ BFMSX BLACKROCK LOW DURATION [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ CINCX CALVERT INCOME FD CL I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ FAOIX FIDELITY ADV OVERSEAS FD [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ IIAXX BANK OF AMERICA, NA RASP [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ LZEMX LAZARD EMERGING MARKETS [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ MAGCX BLACKROCK ADVANTAGE [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ MALVX BLACKROCK ADVANTAGE LRG [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch IRA ⇒ MDLVX BLACKROCK ADVANTAGE LRG [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch IRA ⇒ MRSIX MFS RESEARCH [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch IRA ⇒ MSAIX INVESCO AMERICAN VALUE [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ NFEPX COLUMBIA LARGE CAP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch IRA ⇒ NSTMX COLUMBIA SHORT TERM BOND [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch IRA ⇒ OIBYX INVESCO INTERNATIONAL [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ PCRPX PIMCO COMMODITY REAL [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch IRA ⇒ PRLPX PIMCO REAL RETURN FUND [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Oregon PERS Defined Benefit Pension ⇒ Oregon PERS [DB]		Undetermined	None		
DESCRIPTION: Value determined at retirement					
Oregon PERS Individual Account Program ⇒ IAP 2035 Target-Date Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Selco Credit Union checking and savings account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
ULANO Credit Union checking and savings account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Umpqua Bank checking and savings account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

\* 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
State of Oregon	salary	\$78,184.67	\$78,184.67

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Pacific Source Health Plans	Spouse's salary	N/A	N/A

#### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Navient	May 2020	Consolidated Student loans	\$15,001 - \$50,000

#### SCHEDULE E: POSITIONS

Position	Name of Organization
Commissioner	Oregon Bureau of Labor and Industries
Board Member	Spirit Mountain Community Fund

#### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

#### SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> <li>o 457 Retirement Account (Owner: SP) DESCRIPTION: Lane County 457 retirement account</li> <li>o Fidelity Investment (Owner: SP) DESCRIPTION: Pacific Source Employee Sponsored Retirement Account</li> <li>o Merrill Edge IRA (Owner: SP)</li> <li>o Merrill Lynch IRA (Owner: SP)</li> <li>o Oregon PERS Defined Benefit Pension</li> <li>o Oregon PERS Individual Account Program</li> </ul>
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#### 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:** Valerie Hoyle , 01/21/2022