



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Stu Barnes-Israel
Status: Congressional Candidate
State/District: IN09

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 04/1/2022
Period Covered: 01/01/2021– 03/31/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IL 529 C ⇒ Vanguard 500 Index 529 [EF]	DC	\$1,001 - \$15,000	None		
IL 529 C ⇒ Vanguard Total Stock Mkt 529 [EF]	DC	\$1,001 - \$15,000	None		
IL 529 L ⇒ Vanguard 500 Index 529 [EF]	DC	\$1,001 - \$15,000	None		
IL 529 L ⇒ Vanguard REIT Index 529 [EF]	DC	\$1,001 - \$15,000	None		
IL 529 L ⇒ Vanguard REIT Index 529 [EF]	DC	\$1,001 - \$15,000	None		
IL 529 L ⇒ Vanguard Total Intl Stock Index 529 [EF]	DC	\$1,001 - \$15,000	None		
IL 529 L ⇒ Vanguard Total Intl Stock Index 529	DC	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[EF]					
IL 529 L ⇒ Vanguard Total Stock Mkt 529 [EF]	DC	\$1,001 - \$15,000	None		
MCK 401K S ⇒ MPPP SSF [MF]		\$15,001 - \$50,000	None		
MCK 401K S ⇒ PSRP SSF [MF]		\$50,001 - \$100,000	None		
WF Investment M ⇒ Apple Inc. (AAPL) [ST]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ IEMG [EF]	SP	\$15,001 - \$50,000	None		
WF Investment M ⇒ LQD [EF]	SP	\$15,001 - \$50,000	None		
WF Investment M ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ SCHD [EF]	SP	\$15,001 - \$50,000	None		
WF Investment M ⇒ SCHF [EF]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ SCHP [EF]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ Tesla, Inc. (TSLA) [ST]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ TFI [EF]	SP	\$100,001 - \$250,000	None		
WF Investment M ⇒ VCIT [EF]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
WF Investment M ⇒ VEA [EF]	SP	\$15,001 - \$50,000	None		
WF Investment M ⇒ VIG [EF]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ VOO [EF]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ VTEB [EF]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ VTI [EF]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ VTIP [EF]	SP	\$15,001 - \$50,000	None		
WF Investment M ⇒ VV [EF]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ VWO [EF]	SP	\$1,001 - \$15,000	None		
WF Investment M ⇒ VXF [EF]	SP	\$1,001 - \$15,000	None		
WF Roth IRA M ⇒ BND [EF]	SP	\$1 - \$1,000	None		
WF Roth IRA M ⇒ EMB [EF]	SP	\$1,001 - \$15,000	None		
WF Roth IRA M ⇒ LQD [EF]	SP	\$1,001 - \$15,000	None		
WF Roth IRA M ⇒ VEA [EF]	SP	\$1,001 - \$15,000	None		
WF Roth IRA M ⇒ VIG [EF]	SP	\$1 - \$1,000	None		
WF Roth IRA M ⇒ VNQ [EF]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
WF Roth IRA M ⇒ VTI [EF]	SP	\$1,001 - \$15,000	None		
WF Roth IRA M ⇒ VWO [EF]	SP	\$1 - \$1,000	None		
WF Roth IRA S ⇒ EMB [EF]		\$1,001 - \$15,000	None		
WF Roth IRA S ⇒ LQD [EF]		\$15,001 - \$50,000	None		
WF Roth IRA S ⇒ VEA [EF]		\$1,001 - \$15,000	None		
WF Roth IRA S ⇒ VIG [EF]		\$1,001 - \$15,000	None		
WF Roth IRA S ⇒ VNQ [EF]		\$1,001 - \$15,000	None		
WF Roth IRA S ⇒ VTI [EF]		\$1,001 - \$15,000	None		
WF Trad IRA M ⇒ BND [EF]	SP	\$1,001 - \$15,000	None		
WF Trad IRA M ⇒ EMB [EF]	SP	\$1 - \$1,000	None		
WF Trad IRA M ⇒ LQD [EF]	SP	\$1,001 - \$15,000	None		
WF Trad IRA M ⇒ VEA [EF]	SP	\$1 - \$1,000	None		
WF Trad IRA M ⇒ VIG [EF]	SP	\$1 - \$1,000	None		
WF Trad IRA M ⇒ VNQ [EF]	SP	\$1 - \$1,000	None		
WF Trad IRA M ⇒ VTI [EF]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
WF Trad IRA M ⇒ VWO [EF]	SP	\$1 - \$1,000	None		
WF Trad IRA S ⇒ EMB [EF]		\$1,001 - \$15,000	None		
WF Trad IRA S ⇒ LQD [EF]		\$1,001 - \$15,000	None		
WF Trad IRA S ⇒ VEA [EF]		\$1,001 - \$15,000	None		
WF Trad IRA S ⇒ VNQ [EF]		\$1,001 - \$15,000	None		
WF Trad IRA S ⇒ VTI [EF]		\$1,001 - \$15,000	None		
WF Trad IRA S ⇒ VWO [EF]		\$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
McKinsey & Company Inc US	Salary	N/A	\$55,559.30
Citadel Group Holdings L DBA Citadel Enterprise	Salary	N/A	\$393,627.55
WAL-MART ASSOCIATES INC	Spouse salary	N/A	\$105,209.24

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Earnest	May 2018	Student loans	\$50,001 - \$100,000
JT	Element Financial	July 2020	Mortgage	\$500,001 - \$1,000,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wealthfront	March 2022	Line of credit	\$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

- o IL 529 C (Owner: DC)
LOCATION: IL
- o IL 529 L (Owner: DC)
LOCATION: IL
- o MCK 401K S
- o WF Investment M (Owner: SP)
LOCATION: US
- o WF Roth IRA M (Owner: SP)
- o WF Roth IRA S
- o WF Trad IRA M (Owner: SP)
- o WF Trad IRA S

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: Stu Barnes-Israel , 04/1/2022