



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Kathleen Harder  
**Status:** Congressional Candidate  
**State/District:** OR06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2022  
**Filing Date:** 05/16/2022  
**Period Covered:** 01/01/2021– 04/30/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Arvest Bank [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Equitable Brokerage Account ⇒ Cash [BA]	JT	\$1,001 - \$15,000	None		
Equitable Brokerage Account ⇒ Fidelity Advisor Consumer Staples Cl A [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Equitable Brokerage Account ⇒ Fidelity Advisor Health Care Cl A [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Equitable Brokerage Account ⇒ Fidelity Advisor Industrials Cl A [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
Equitable Brokerage Account ⇒ Fidelity Advisor New Insights Cl A [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Equitable Brokerage Account ⇒ FS KKR Capital Corp. (FSK) [ST]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Equitable Brokerage Account ⇒	JT	None	Dividends	None	\$2,501 -

<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>
FS KKR Capital Corp. II (FSKR) [ST]					\$5,000
Equitable Brokerage Account ⇒ Realty Income Corporation (O) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Equitable Brokerage Account ⇒ VEREIT, Inc. (VER) [ST]	JT	None	Capital Gains, Dividends	None	\$1,001 - \$2,500
Equitable IRA FBO Robert Harder ⇒ Corporate Property Associates 18 Global Cl A [RE]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ American Balanced Fund Cl F2 [MF]		\$50,001 - \$100,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Cash and equivalents [BA]		\$1,001 - \$15,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Columbia Balanced Institutional Cl [MF]		\$50,001 - \$100,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Columbian Contrarian Core Fund Institutional Cl [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ First Eagle Global Fund Cl I [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Janus Henderson Enterprise Fund Cl I [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Janus Henderson Enterprise Fund Cl T [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ PGIM Jennison Health Sciences Fund Cl Z [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ SPDR S&P 500 (SPY) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Kathleen Harder ⇒ Vanguard Wellesley Income Fund Admiral Cl [MF]		\$100,001 - \$250,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒	SP	\$100,001 -	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>
American Balanced Fund Cl F2 [MF]		\$250,000			
Equitable Rollover IRA FBO Robert Harder ⇒ Cash and equivalents [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Columbia Balanced Institutional Cl [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Fidelity Advisor Health Care Fund Cl A [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ First Eagle Global Fund Cl I [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Hartford Capital Appreciation Fund Cl A [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Janus Henderson Enterprise Fund Cl T [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ SPDR S&P 500 (SPY) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Equitable Rollover IRA FBO Robert Harder ⇒ Vanguard Wellesley Income Fund Admiral Cl [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ 1290 VT GAMCO Small Company Value Portfolio [MF]		\$50,001 - \$100,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ Cash and equivalents [BA]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ Delaware Ivy Asset Strategy Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ Delaware Ivy VIP High Income Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒ EQ/Fidelity Institutional AM Large Cap Portfolio [MF]		\$50,001 - \$100,000	Tax-Deferred		
Equitable Variable Annuity - Kathleen Harder ⇒		\$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>
EQ/Franklin Strategic Income Fund [MF]					
Equitable Variable Annuity - Kathleen Harder ⇒ Templeton Global Bond VIP Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ Cash and equivalents [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ Delaware Ivy VIP Asset Strategy Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ Delaware Ivy VIP High Income Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ EQ/Equity 500 Index Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ EQ/Fidelity Institutional AM Large Cap Portfolio [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ EQ/Franklin Strategic Income Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ EQ/Large Cap Growth Index Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ Fidelity VIP Strategic Income Portfolio [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 1 - Robert Harder ⇒ Templeton Global Bond VIP Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ 1290 VT GAMCO Small Company Value Portfolio [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ Cash and equivalents [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ Delaware Ivy VIP High Income Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒	SP	\$1,001 - \$15,000	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>
EQ/MFS Utilities Series Portfolio [MF]					
Equitable Variable Annuity 2 - Robert Harder ⇒ Fidelity VIP Strategic Income Portfolio [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable Variable Annuity 2 - Robert Harder ⇒ Templeton Global Bond VIP Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable Variable Annuity 3 - Robert Harder ⇒ Equitable Russell 2000 5-year Structured Investment Option Annuity Contract [OT]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Structured Investment Option					
Equitable Variable Annuity 3 - Robert Harder ⇒ Equitable S&P 500 5-year Structured Investment Option Annuity Contract [OT]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Structured Investment Option					
Hall Asset Holdings, LLC [RP]	JT	\$50,001 - \$100,000	Interest	None	\$5,001 - \$15,000
LOCATION: Dallas, TX, US DESCRIPTION: Company holding commercial real estate in Dallas, TX.					
Hall Wines of Napa, LP [OL]	JT	\$1,001 - \$15,000	Partnership income	None	\$5,001 - \$15,000
LOCATION: Dallas, TX, US DESCRIPTION: Winery					
Jumping Spider Holdings, LLC ⇒ Rolling Lakes Development LLC [RP]	JT	None	Partnership income	None	\$100,001 - \$1,000,000
LOCATION: Stillwater, OK, US DESCRIPTION: Holds undeveloped land in Stillwater, OK					
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ Cash and equivalents [BA]	JT	\$1,001 - \$15,000	None		
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ CIM Real Estate Finance Trust Inc. [RE]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ Columbia Tax Exempt Cl A [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ Corporate Property Associates 18 Global Cl A [RE]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ Invesco Ltd Term Mun Income Cl A [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account ⇒ KBS Real Estate Investment Trust III Inc. [RE]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Pioneer Trust Bank [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	\$201 - \$1,000
Python Development LLC [RP]  LOCATION: Stillwater, OK, US DESCRIPTION: Holds commercial rental property, Stillwater, OK.	SP	\$250,001 - \$500,000	Partnership income	None	\$50,001 - \$100,000
Salem Clinic 401(k) ⇒ Morley Stable Value Fund Cl 25-I [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
Salem Clinic 401(k) ⇒ Schwab Total Market Index Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		
Salem Clinic 401(k) - SP ⇒ Baird Aggregate Bond Fund Institutional [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Salem Clinic 401(k) - SP ⇒ Principal Real Estate Securities Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Salem Clinic 401(k) - SP ⇒ Schwab Total Stock Market Index Fund [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
Sono LLC [OL]  LOCATION: Salem, OR, US DESCRIPTION: Owns real estate and equipment for Salem Clinic PC, a medical office.	JT	\$250,001 - \$500,000	Partnership income	None	\$15,001 - \$50,000
TCB Real Estate Investments, LLC ⇒ Commercial rental property, E. Franklin [RP]  LOCATION: Weatherford, OK, US	SP	\$1,001 - \$15,000	None		

<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>
TCB Real Estate Investments, LLC ⇒ Commercial rental property, E. Main St. [RP]  LOCATION: Pawhuska, OK, US	SP	\$1,001 - \$15,000	None		
TCB Real Estate Investments, LLC ⇒ Commercial rental property, N. Washington [RP]  LOCATION: Weatherford, OK, US	SP	\$1,001 - \$15,000	None		
TCB Real Estate Investments, LLC ⇒ Commercial rental property, S. Main #2 [RP]  LOCATION: Stillwater, OK, US	SP	\$1,001 - \$15,000	None		
TCB Real Estate Investments, LLC ⇒ Commercial rental property, S. Main #3 [RP]  LOCATION: Stillwater, OK, US	SP	\$1,001 - \$15,000	None		
TCB Real Estate Investments, LLC ⇒ Commercial rental property, S. Main St. [RP]  LOCATION: Stillwater, OK, US	SP	\$15,001 - \$50,000	None		
TCB Real Estate Investments, LLC ⇒ Commercial rental property, W. 7th [RP]  LOCATION: Stillwater, OK, US	SP	\$15,001 - \$50,000	None		
TCB Real Estate Investments, LLC ⇒ Commercial rental property, W. 8th [RP]  LOCATION: Stillwater, OK, US	SP	\$15,001 - \$50,000	None		
TCB Real Estate Investments, LLC ⇒ Commercial rental property, W. Main [RP]  LOCATION: Weatherford, OK, US	SP	\$1,001 - \$15,000	None		
TCB Real Estate Investments, LLC ⇒ Commercial rental property, W. Main St. #2 [RP]  LOCATION: Weatherford, OK, US	SP	\$1,001 - \$15,000	None		
TCB Real Estate Investments, LLC ⇒ TCB Real Estate Investments, LLC [RP]  LOCATION: Weatherford, OK, US DESCRIPTION: Company holding commercial real estate.	SP	None	Partnership income	None	\$15,001 - \$50,000
Teocalli Exploration, LLC [RP]  LOCATION: Oklahoma City, OK, US DESCRIPTION: Holds oil well.	SP	Undetermined	Royalties	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
-------	-------	----------------	----------------	-------------------------------	-----------------------

\* 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
Salem Clinic PC	spouse salary	N/A	N/A
Intuitive Surgical Inc.	spouse consulting fee	N/A	N/A
Oregon Medical Board	salary	\$2,399.00	\$4,236.00
Salem Clinic PC	salary	\$19,214.56	\$135,095.00

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Sono LLC
Member	Jumping Spider Holdings, LLC

### 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 Equitable Brokerage Account (Owner: JT)  
LOCATION: US
- o Equitable IRA FBO Robert Harder (Owner: SP)
- o Equitable Rollover IRA FBO Kathleen Harder
- o Equitable Rollover IRA FBO Robert Harder (Owner: SP)
- o Equitable Variable Annuity - Kathleen Harder
- o Equitable Variable Annuity 1 - Robert Harder (Owner: SP)

- Equitable Variable Annuity 2 - Robert Harder (Owner: SP)
- Equitable Variable Annuity 3 - Robert Harder (Owner: SP)
- Jumping Spider Holdings, LLC (Owner: JT)  
LOCATION: Salem, OR, US
- Jumping Spider Holdings, LLC ⇒ Equitable Brokerage Account (Owner: JT)  
LOCATION: US
- Salem Clinic 401(k)
- Salem Clinic 401(k) - SP (Owner: SP)
- TCB Real Estate Investments, LLC (Owner: SP)  
LOCATION: Weatherford, OK, US  
DESCRIPTION: Holds commercial real estate

## 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:** Kathleen Harder , 05/16/2022