



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Merritt Hale
Status: Congressional Candidate
State/District: VA06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 05/8/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Edward Jones- Exchange-Traded & Closed End Fund (DIA) [EF] DESCRIPTION: SPDR DOW JONES INDUST AVE ETF (DIA)		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones- Exchange-Traded & Closed End Fund (IWD) [EF] DESCRIPTION: ISHARES RUSS 1000 VALUE ETF (IWD)		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones- Exchange-Traded & Closed End Fund (MUB) [EF] DESCRIPTION: ISHARES NATL MUN BOND ETF (MUB)		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones- Exchange-Traded & Closed End Fund (S&P 500) [EF] DESCRIPTION: ISHARES S&P 500 GROWTH ETF (IVW)		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones- Exchange-Traded & Closed End Fund (VBK) [EF] DESCRIPTION: VANGUARD SMALL CAP GROWTH ETF (VBK)		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones- Exchange-Traded & Closed End Fund (VXF) [EF] DESCRIPTION: VANGUARD EXTENDED MARKET ETF (VXF)		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Edward Jones Mutual Funds (FGTXX) [MF] DESCRIPTION: GOLDMAN FS GOVERNMENT I (FGTXX)		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones Mutual Funds (FHYRX) [MF] DESCRIPTION: FRANKLIN HIGH YIELD TF INC R6 (FHYRX)		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones Mutual Funds (TROIX) [MF] DESCRIPTION: TRP OVERSEAS STOCK I (TROIX)		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones- Savings [OT] DESCRIPTION: Personal savings account		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
LPL- Cash And Equivalents- Hale, Merritt [OT] DESCRIPTION: Insured Cash Account		\$1,001 - \$15,000	None		
LPL-Large Cap U.S. Growth Equity [OT] DESCRIPTION: GROWTH FUND OF AMERICA CL A		\$15,001 - \$50,000	Tax-Deferred		
LPL-Structured Product [OT] DESCRIPTION: GS FINANCE CORP INDEX LKD NOTE LKD RTY NDX CPN 0.000% DUE 09/03/24 DTD 08/31/21		\$1,001 - \$15,000	Tax-Deferred		
Perspecta/Peraton IRA Large US Equity [OT] DESCRIPTION: Large U.S. Equity Asset class		\$1,001 - \$15,000	Tax-Deferred		
Perspecta/Peraton IRA Mid US Equity [OT] DESCRIPTION: Mid U.S. Equity		\$1,001 - \$15,000	Tax-Deferred		
Perspecta/Peraton IRA Van total bond [OT] DESCRIPTION: Van total bond		\$1,001 - \$15,000	Tax-Deferred		
Robinhood Crypto Currency- ETC [OT] DESCRIPTION: Made \$759 in 2001 in Bitcoin		\$1 - \$1,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Robinhood Crypto Currency- ETC [OT] DESCRIPTION: Made \$1606 in 2021 in Ethereum Classic		\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1,001 - \$2,500
Robinhood Crypto Currency- Ethereum [OT] DESCRIPTION: Made \$455 in Ethereum in 2021		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000

* 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
Perspecta Engineering Inc	Salary	\$32,813.54	\$104,017.63

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	DFAS	Jan 2022	Pay back educational expenses	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

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: Merritt Hale , 05/8/2022