



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Mary Brooks Todd  
**Status:** Congressional Candidate  
**State/District:** MT01

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2022  
**Filing Date:** 05/13/2022  
**Period Covered:** 01/01/2021– 05/1/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Cabin Creek Landing B&B [RP]  LOCATION: Marion, MT, US DESCRIPTION: Bed and Breakfast		\$1,000,001 - \$5,000,000	None		
East Village Apartments LLC ⇒ EVA, 90% Interest [OL]  LOCATION: Kalispell, MT, US DESCRIPTION: Apartments jointly owned.	JT	\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
East Village Apartments LLC ⇒ Glacier Bank EVA Account, 90% Interest [BA]  DESCRIPTION: Bank Account for EVA	JT	\$1,001 - \$15,000	None		
Mary Todd IRA ⇒ Fortuna Silver Mines Inc Ordinary Shares (FSM) [ST]  DESCRIPTION: Silver and Gold Mining Company		\$1,001 - \$15,000	Tax-Deferred		
Mary Todd IRA ⇒ Silver Sands [PS]  DESCRIPTION: SSRG Silver Sands. Is a silver exploration company		\$1 - \$1,000	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>
Mary Todd IRA ⇒ TD Ameritrade Corporate Services [BA] DESCRIPTION: Cash held in IRA		\$1 - \$1,000	Tax-Deferred		
Rick & Mary Joint Holdings ⇒ Altius Minerals Corp Ordinary Shares (ATUSF) [ST] DESCRIPTION: Commodity Miner	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Rick & Mary Joint Holdings ⇒ B2Gold Corp Common shares (BTG) [ST] DESCRIPTION: Gold Miner	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Rick & Mary Joint Holdings ⇒ First Majestic Silver Corp. Ordinary Shares (AG) [ST] DESCRIPTION: Primary Silver Miner	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Rick & Mary Joint Holdings ⇒ First Mining Gold Corporation [PS] DESCRIPTION: GOLD PROPERTY INVESTOR. IN ORDER TO DEVELOP MINE PROPERTIES AND SELL THEM OF.	JT	\$1,001 - \$15,000	Tax-Deferred		
Rick & Mary Joint Holdings ⇒ Fortuna Silver Mines Inc Ordinary Shares (FSM) [ST] DESCRIPTION: Primary Silver and Gold Miner	JT	\$1,001 - \$15,000	None		
Rick & Mary Joint Holdings ⇒ Kalispell House [DO] DESCRIPTION: Personal House	JT	\$1,000,001 - \$5,000,000	None		
Rick & Mary Joint Holdings ⇒ Lytle Creek [DO] DESCRIPTION: Note held on Lytle Creek	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	\$15,001 - \$50,000
Rick & Mary Joint Holdings ⇒ Newcrest Mining Ltd Ord Ordinary Shares (NCMGF) [ST] DESCRIPTION: Schwab Newcrest Mines	JT	\$1,001 - \$15,000	None		
Rick & Mary Joint Holdings ⇒ PMI [CO] DESCRIPTION: Metals held in storage	JT	\$100,001 - \$250,000	None		

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Rick & Mary Joint Holdings ⇒ Ranch Acreage [RP]  LOCATION: Marion, MT, US DESCRIPTION: 48 Acres in Marion Montana	JT	\$250,001 - \$500,000	None		
Rick & Mary Joint Holdings ⇒ TD Ameritrade Cash Account (Joint) [BA]  DESCRIPTION: Cash Account for TD Ameritrade Personal Account	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ TrailWest Bank Personal [BA]  DESCRIPTION: TrailWest personal bank account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Truman Group, 100% Interest [OL]  LOCATION: Kalispell, MT, US DESCRIPTION: Property and assets owned by Truman Group	JT	\$5,000,001 - \$25,000,000	Distribution	\$5,001 - \$15,000	\$15,001 - \$50,000
Rick & Mary Joint Holdings ⇒ USAA Personal [BA]  DESCRIPTION: Bank Account	JT	\$5,000,001 - \$25,000,000	Interest	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ USAA Savings [BA]  DESCRIPTION: USAA Savings Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Wells Fargo Personal [BA]  DESCRIPTION: Wells Fargo Bank Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Cabin Creek Landing B&B ⇒ Bed and Breakfast Wells Checking [BA]  DESCRIPTION: Bed and Breakfast checking Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Cabin Creek Landing B&B ⇒ Cabin Creek Laanding B&B Glacier Account [BA]  DESCRIPTION: Bed and Breakfast Checking	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Cabin Creek Landing B&B ⇒ Whitefish Credit Union [BA]  DESCRIPTION: Savings Account for B&B	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200

<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>
Rick & Mary Joint Holdings ⇒ Pacific Heritage Investments LLC ⇒ Pacific Heritage Investments LLC [RP]  LOCATION: Claremont, CA, US DESCRIPTION: Pacific Heritage investments office building in Claremont, Ca	JT	\$1,000,001 - \$5,000,000	Distribution	\$15,001 - \$50,000	\$15,001 - \$50,000
Rick & Mary Joint Holdings ⇒ Southlake Villager Community LLC ⇒ Prosperity Bank Southlake Villager [BA]  DESCRIPTION: Southlake Villager Bank Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Southlake Villager Community LLC ⇒ Southlake Villager Community LLC [RP]  LOCATION: Southlake, TX, US DESCRIPTION: Southlake Villager Income and Value	JT	\$250,001 - \$500,000	Distribution	\$5,001 - \$15,000	\$50,001 - \$100,000
Rick & Mary Joint Holdings ⇒ Truman Group ⇒ First Majestic Silver Corp. Ordinary Shares (AG) [ST]  DESCRIPTION: Primary Silver Miner	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Truman Group ⇒ First Mining Gold [PS]  DESCRIPTION: Accumulates Gold Mining Projects	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Truman Group ⇒ Prosperity Bank Truman Group Account [BA]  DESCRIPTION: Bank Account for Truman Group	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Truman Group ⇒ Silver One Resources [PS]  DESCRIPTION: Silver Explorer	JT	\$1,001 - \$15,000	None		
Rick & Mary Joint Holdings ⇒ Truman Group ⇒ Silver Sands [PS]  DESCRIPTION: Silver Explorer	JT	\$1 - \$1,000	None		
Rick & Mary Joint Holdings ⇒ Truman Group ⇒ TrailWest Bank Account [BA]  DESCRIPTION: Bank Account for Truman Group with TrailWest Bank	JT	\$5,000,001 - \$25,000,000	None		
Rick & Mary Joint Holdings ⇒ Truman Group ⇒ Treasury Metals Inc Common shares (TSRMF) [ST]  DESCRIPTION: Miner	JT	\$1 - \$1,000	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>
Rick & Mary Joint Holdings ⇒ Truman Group ⇒ Treasury Metals Warrant [SA] DESCRIPTION: Warrant for Treasury Metals	JT	\$1 - \$1,000	None		
Rick & Mary Joint Holdings ⇒ Truman Investments ⇒ TrailWest Bank Account Truman Investments [BA] DESCRIPTION: Bank Account for Truman Storage	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Rick & Mary Joint Holdings ⇒ Truman Investments ⇒ Truman Storage [RP] LOCATION: Kalispell, MT, US DESCRIPTION: Storage Units	JT	\$1,000,001 - \$5,000,000	Dividends	None	\$5,001 - \$15,000
Rick Todd ⇒ Altius Minerals Corp Ordinary Shares (ATUSF) [ST] DESCRIPTION: Natural Resource Company	SP	\$100,001 - \$250,000	Tax-Deferred		
Rick Todd ⇒ B2Gold Corp Common shares (BTG) [ST] DESCRIPTION: Gold Mining Company	SP	\$100,001 - \$250,000	Tax-Deferred		
Rick Todd ⇒ Environmental Technologies [PS] DESCRIPTION: ENVIROMETAL TECHNOLOGIES. METAL PROCESSING IN ORDER TO EXTRACT METAL FROM WASTE AND MINES	SP	\$1,001 - \$15,000	Tax-Deferred		
Rick Todd ⇒ Fidelity AA Retirement Account [PS] DESCRIPTION: Fidelity Retirement Account	SP	\$15,001 - \$50,000	Tax-Deferred		
Rick Todd ⇒ First Majestic Silver Corp. Ordinary Shares (AG) [ST] DESCRIPTION: First Majestic Silver Corporation Primary Silver Mining Stock	SP	\$100,001 - \$250,000	Tax-Deferred		
Rick Todd ⇒ First Mining Gold Corp [PS] DESCRIPTION: FFMGF. INVESTS IN MINING PROPERTIES IN ORDER TO DEVELOP IN MINES OR TO SELL THEM OFF FOR ROYALTIES OR INCOME	SP	\$1,001 - \$15,000	Tax-Deferred		
Rick Todd ⇒ Fortuna Silver Mines Inc Ordinary Shares (FSM) [ST]	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>
DESCRIPTION: SILVER AND GOLD MINER					
Rick Todd ⇒ Global X Gold Explorers ETF (GOEX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: ETF FOR GOLD EXPLORING COMPANIES					
Rick Todd ⇒ Newcrest Mining Ltd Ord Ordinary Shares (NCMGF) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: OWNER OF A NUMBER OF GOLD MINES					
Rick Todd ⇒ Newcrest Mining Ltd Ord Ordinary Shares (NCMGF) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Newcrest Mines held at Schwab					
Rick Todd ⇒ Rick IRA TD Ameritrade [BA]	SP	\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Money held in account at TD Ameritrade					
Rick Todd ⇒ Silver Sands [PS]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: SILVER SANDS EXPLORER FOR SILVER					
Rick Todd ⇒ Sprott Physical Silver Trust ETV (PSLV) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Sprott Silver Holdings					
Rick Todd ⇒ Treasury Metals Inc Common shares (TSRMF) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Metal Mining					
Rick Todd ⇒ VanEck Gold Miners ETF (GDX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Gold Miner Exchange Traded Fund					
Rick Todd ⇒ VanEck Junior Gold Miners ETF (GDXJ) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Junior Gold Miner ETF					

\* 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
Truman Group	Spouses Salary	N/A	\$3,000.00
Truman Group	Truman Group Monthly Salary	\$4,000.00	\$9,000.00
American Airlines	Spouses Retirement	\$16,419.00	\$49,257.00
Social Security	Spouse's Social Security	\$10,830.00	\$29,055.00
Social Security	Personal Social Security	\$4,688.00	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	TrailWest Bank	August 2020	Commerical Building Loan (Truman Building)	\$100,001 - \$250,000
JT	TrailWest Bank	March 2018	Office Building (Executive Plaza)	\$250,001 - \$500,000
JT	TrailWest Bank	December 2020	Line of Credit for Truman Group	\$50,001 - \$100,000
JT	TrailWest Bank	November of 2018	Personal Home in Kalispell	\$250,001 - \$500,000
JT	TrailWest Bank	March 2018	25% of the Total Loan on Truman Storage	\$1,000,001 - \$5,000,000
JT	Whitefish Credit Union	September 2012	Loan on the Bed and Breakfast in Marion, Mt	\$100,001 - \$250,000
JT	SBA	June 2020	SBA Loan	\$100,001 - \$250,000
JT	SBA	June 2020	SBA Loan for Cabin Creek Landing B&B	\$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

- East Village Apartments LLC (90% Interest) (Owner: JT)  
LOCATION: Kalispell, MT, US  
DESCRIPTION: East Village Apartments on 4th St E/4th Ave E
- Mary Todd IRA  
DESCRIPTION: Mary Todd Asset
- Rick & Mary Joint Holdings (100% Interest) (Owner: JT)  
LOCATION: US  
DESCRIPTION: Stocks Held Jointly
- Rick & Mary Joint Holdings ⇒ Cabin Creek Landing B&B (100% Interest) (Owner: JT)  
LOCATION: Marion, MT, US  
DESCRIPTION: Bed and Breakfast in Marion MT
- Rick & Mary Joint Holdings ⇒ Pacific Heritage Investments LLC (50% Interest) (Owner: JT)  
LOCATION: Claremont, CA, US  
DESCRIPTION: Office Building in Claremont California
- Rick & Mary Joint Holdings ⇒ Southlake Villager Community LLC (100% Interest) (Owner: JT)  
LOCATION: Southlake , TX, US  
DESCRIPTION: Property Owned by Southalke Village Community LLC
- Rick & Mary Joint Holdings ⇒ Truman Group (100% Interest) (Owner: JT)  
LOCATION: Kalispell, MT, US  
DESCRIPTION: Properties and investments held by Truman Group Inc
- Rick & Mary Joint Holdings ⇒ Truman Investments (25% Interest) (Owner: JT)  
LOCATION: Kalispell, MT, US  
DESCRIPTION: Mary and Rick Todd joint ownership of Truman Invesments
- Rick Todd (Owner: SP)  
DESCRIPTION: 401K for Richard B. Todd

## 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:** Mary Brooks Todd , 05/13/2022