



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Joanne R. Terry
Status: Congressional Candidate
State/District: FL08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 05/10/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Boeing Pension [PE]		\$100,001 - \$250,000	Tax-Deferred		
Catalina 42' Sloop [RP]		\$50,001 - \$100,000	None		
LOCATION: Satellite Beach/Brevard, FL, US					
Chase Bank Account [BA]		\$15,001 - \$50,000	None		
Harris 401K ⇒ Stable Value [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
HSA [BA]		\$15,001 - \$50,000	None		
IRA ⇒ FBALX [MF]		\$50,001 - \$100,000	Tax-Deferred		
IRA ⇒ FCPVX [MF]		\$100,001 - \$250,000	Tax-Deferred		
IRA ⇒ FDLSX [MF]		\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA ⇒ FDRXX [MF]		\$250,001 - \$500,000	Tax-Deferred		
IRA ⇒ Fidelity Professionally Managed Account, 100% Interest [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
IRA ⇒ FIDSX [MF]		\$50,001 - \$100,000	Tax-Deferred		
IRA ⇒ FOCPX [MF]		\$100,001 - \$250,000	Tax-Deferred		
IRA ⇒ FRESX [MF]		\$50,001 - \$100,000	Tax-Deferred		
IRA ⇒ FSCSX [MF]		\$100,001 - \$250,000	Tax-Deferred		
IRA ⇒ FSRPX [MF]		\$100,001 - \$250,000	Tax-Deferred		
IRA ⇒ FZCXX [MF]		\$100,001 - \$250,000	Tax-Deferred		
IRA ⇒ Norwegian Cruise Line Holdings Ltd. Ordinary Shares (NCLH) [ST]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ SPAXX [MF]		\$100,001 - \$250,000	Tax-Deferred		
IRA ⇒ Tesla, Inc. (TSLA) [ST]		\$15,001 - \$50,000	Tax-Deferred		
LPL IRA BDA [IH]		\$15,001 - \$50,000	1099R Distribution	\$15,001 - \$50,000	\$5,001 - \$15,000
LPL TOD [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
NY Life [FN]		\$1,001 - \$15,000	1099R Distribution	\$1,001 - \$2,500	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Primary Residence [RP]		\$500,001 - \$1,000,000	None		
LOCATION: Satellite Beach/Brevard, FL, US					
SCCU Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
TOD Account ⇒ FOCPX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
TOD Account ⇒ SPAXX [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
TOD Account ⇒ SPRXX [MF]		\$15,001 - \$50,000	Dividends	\$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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Regions Mortgage	September 2021	Refinanced mortgage on primary residence	\$100,001 - \$250,000

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

- Harris 401K (Owner: SP)
- IRA

- TOD Account
LOCATION: US

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: Joanne R. Terry , 05/10/2022