



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Dr. Brad Dr Allen  
**Status:** Congressional Candidate  
**State/District:** CA24

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2022  
**Filing Date:** 05/11/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Investments ⇒ Fedeliy Investments [OT] DESCRIPTION: Stock Portfolio		\$250,001 - \$500,000	Dividends	None	None
Merril Lynch Beneficial IRA ⇒ Merril Lynch Investments [OT] DESCRIPTION: Stock Portfolio		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
Merril Lynch Investments ⇒ Merril Lynch Investments [OT] DESCRIPTION: Stock Portfolio		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
Neuberger Berman Investments ⇒ Neuberger Berman Private Investments [OT] DESCRIPTION: Stock Portfolio		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Neuberger Berman Investments ⇒ Neuberger Berman Private Investments [OT] DESCRIPTION: Stock portfolio		\$500,001 - \$1,000,000	Capital Gains, Dividends	None	None
State University Of Illinois Retirement ⇒		Undetermined	Monthly income	\$15,001 - \$50,000	\$50,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
State University Of Illinois Retirement Plan [OT]					\$100,000
DESCRIPTION: Fixed Income from Retirement Plan					

\* 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
Spouse received from Fabricut, TransformCo, SC Direct	I did not earn anything. Spouse earned from Licensing	N/A	N/A

### SCHEDULE D: LIABILITIES

None disclosed.

### 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 Fidelity Investments
- o Merrill Lynch Beneficial IRA
- o Merrill Lynch Investments  
LOCATION: US
- o Neuberger Berman Investments
- o State University Of Illinois Retirement

### 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:** Dr. Brad Dr Allen , 05/11/2022