



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Christy Smith  
**Status:** Congressional Candidate  
**State/District:** CA27

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2022  
**Filing Date:** 05/16/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset          | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-------------------------|----------------|-------------------------------|-----------------------|
| AXA Equitable 401(k) Plan ⇒<br>AXA Target 2025 Allocation Fund [MF] | SP    | \$1 - \$1,000           | None           |                               |                       |
| AXA Equitable 401(k) Plan ⇒<br>AXA Target 2030 Allocation Fund [MF] | SP    | \$50,001 -<br>\$100,000 | None           |                               |                       |
| AXA Equitable 401(k) Plan ⇒<br>AXA Target 2055 Allocation Fund [MF] | SP    | \$1,001 - \$15,000      | None           |                               |                       |
| AXA Equitable 401(k) Plan ⇒<br>BlackRock Equity Index Fund [MF]     | SP    | \$50,001 -<br>\$100,000 | None           |                               |                       |
| AXA Equitable 401(k) Plan ⇒<br>BlackRock MSCI [MF]                  | SP    | \$1,001 - \$15,000      | None           |                               |                       |
| AXA Equitable 401(k) Plan ⇒<br>BlackRock Russell [MF]               | SP    | \$1 - \$1,000           | None           |                               |                       |
| AXA Equitable 401(k) Plan ⇒<br>EQ/GAMCO [MF]                        | SP    | \$1,001 - \$15,000      | None           |                               |                       |
| AXA Equitable 401(k) Plan ⇒   | SP    | \$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> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Fixed Income Fund [MF]   |              |                       |                       |                                      |                              |
| AXA Equitable 401(k) Plan ⇒<br>Hood River Small Cap Growth Fund [MF]           | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| AXA Equitable 401(k) Plan ⇒<br>MFS International Growth Fund [MF]              | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| AXA Equitable 401(k) Plan ⇒<br>Sprucegrove U.S. International Pooled Fund [MF] | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| Equitable Holdings, Inc. (EQH) [ST]  | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| JNL IRA ⇒<br>DCA Plus [MF]   | SP           | \$100,001 - \$250,000 | None                  |                                      |                              |
| JNL IRA ⇒<br>JNL Aggressive Growth Allocation [MF]                             | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| JNL IRA ⇒<br>JNL iShares Tactical Growth [MF]                                  | SP           | \$50,001 - \$100,000  | None                  |                                      |                              |
| JNL IRA ⇒<br>JNL/American Funds Balanced [MF]                                  | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| JNL IRA ⇒<br>JNL/American Funds Capital Income Builder [MF]                    | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| JNL IRA ⇒<br>JNL/American Funds Growth-Income [MF]                             | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| JNL IRA ⇒<br>JNL/AQR Large Cap Defensive Style [MF]                            | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| JNL IRA ⇒<br>JNL/Mellon Healthcare Sector [MF]                                 | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| JNL IRA ⇒<br>JNL/Mellon Information Technology Sector [MF]                     | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| Wells Fargo Accounts [BA]  | JT           | \$100,001 -           | Interest              | \$1 - \$200                          | \$1 - \$200                  |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|-------|-------|----------------|----------------|-------------------------------|-----------------------|
|       |       | \$250,000      |                |                               |                       |

\* 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 |
|------------------------------|---------------|-------------------------------|-----------------------|
| Delta Stewardship Council    | Salary        | \$19,278.00                   | \$46,268.00           |
| Equitable Advisors           | Spouse Salary | N/A                           | N/A                   |
| Cambridge Financial Partners | Spouse Salary | N/A                           | N/A                   |

### SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type          | Amount of Liability  |
|-------|----------|---------------|---------------|----------------------|
| DC    | Mohela   | June 2017     | Student Loans | \$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

- o AXA Equitable 401(k) Plan (Owner: SP)
- o JNL IRA (Owner: SP)

### 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:** Christy Smith , 05/16/2022