



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Andy Yates
Status: Congressional Candidate
State/District: AZ01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 05/15/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|----------------|-------------------------------|-----------------------|
| Bank Accounts [BA] | | \$100,001 - \$250,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Betterment Core Portfolio [MF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth IRA ⇒ BP p.l.c. (BP) [ST] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Roth IRA ⇒ Roth IRA [IH] | | \$100,001 - \$250,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Traditional IRA ⇒ Betterment Core Portfolio [MF] | | \$50,001 - \$100,000 | Dividends | \$1,001 - \$2,500 | \$1,001 - \$2,500 |

* 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 |
|----------------|---------------|-------------------------------|-----------------------|
| Forage Arizona | Spouse Salary | \$39,026.00 | \$49,024.00 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-------------|---------------|---------------|----------------------|
| SP | Great Lakes | August 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

- Roth IRA
- Traditional IRA

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: Andy Yates , 05/15/2022