Filing ID #10050431

Financial Disclosure Report

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Filer Information

Name: Dr. Annie Andrews
Status: Congressional Candidate
State/District: SC01

Filing Information

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 09/29/2022

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 Plan ⇒ 529 Plans F/B/O Children (3) [MF] Description: 529 Plans F/B/O Grace, Evelyn and Henry Andrews		$100,001 - $250,000	Tax-Deferred		
Cash ⇒ South State Bank Account [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200
Deferred Compensation ⇒ Deferred Compensation [MF] Description: AIG, Metlife and 457 Deferred Compensation Plans		$250,001 - $500,000	Tax-Deferred		
Qualified Retirement (Pre-Tax Account) ⇒ Qualified Retirement (Pre-Tax Accounts) [MF] Description: UMA Retirement Accounts	SP	$1,000,001 - $5,000,000	Tax-Deferred		
Roth IRA (After Tax Account) - Includes Roth 401(k) Plans ⇒ Roth IRA (After-Tax Account) - Includes Roth 401(k) [MF] Description: UMA Roth 403(b) Plans		$250,001 - $500,000	Tax-Deferred		
Roth IRA (After Tax Account) - Includes Roth 401(k) Plans ⇒ Roth IRA (After-Tax Account) -Includes Roth		$100,001 - $250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401(k) [MF] Description: Charles Schwab Roth IRA Accounts					
Taxable Account - Held in Revocable Trust Name ⇒ Taxable Account - Held in Revocable Trust Name [MF] Description: Charles Schwab Mutual Fund Account	SP	$500,001 - $1,000,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	$15,001 - $50,000
Taxable Account - Held in Revocable Trust Name ⇒ Taxable Account - Held in Revocable Trust Name [MF] Description: Charles Schwab investment account	SP	$1,001 - $15,000	Dividends, Interest	$1 - $200	$1 - $200
Taxable Account - Held Individually ⇒ Acorn - Various Stocks [OT] Description: Acorn Stock Account		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Taxable Account - Held Individually ⇒ Robinhood - Various Stocks [OT] Description: Robinhood Account		$1,001 - $15,000	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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Medical University of South Carolina Comments: Anne's MUSC Salary	Anne's Salary	$6,500.00	$19,000.00
University Medical Associates Comments: Anne's Salary	Anne's Salary	$62,000.00	$206,200.00
University Medical Associates Comments: Charlie (Spouse) Salary	Charlie (Spouse) Salary	$375,000.00	$360,000.00
Medical University of South Carolina Comments: Charlie (Spouse) MUSC Salary	Charlie (Spouse) Salary	$25,000.00	$22,000.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	South State Bank, N.A.	7/22/19	30 Year Mortgage on Vacation Home	$250,001 - $500,000
JT	Truist Bank	6/19/20	30 Year Mortgage on Principal Residence	$500,001 - $1,000,000
SP	Nelnet Loan Servicing Comments: Represents Four (4) Student Loans with Various Interest Rates	6/30/2012	Student Loan	$15,001 - $50,000

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

- 529 Plan
  Location: SC
- Cash (Owner: JT)
  Location: US
- Deferred Compensation
  Location: US
- Qualified Retirement (Pre-Tax Account) (Owner: SP)
- Roth IRA (After Tax Account) - Includes Roth 401(k) Plans
- Taxable Account - Held in Revocable Trust Name (100% Interest) (Owner: SP)
  Location: SC, US
- Taxable Account - Held Individually
  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: Dr. Annie Andrews , 09/29/2022