Filing ID #10055789

Financial Disclosure Report

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Filer Information

Name: Brian Jones
Status: Congressional Candidate
State/District: FL08

Filing Information

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 09/6/2023

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Owens Corning Inc Common Stock New (OC) [ST]		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Description: Holding Owens Corning in my stock portfolio with expected dividend payments through 2023					
Personal 401K ⇒ SPDR S&P 500 (SPY) [ST]		$250,001 - $500,000	None		
Description: Employer assisted 401K in my name worth ~ $475,000. Not currently withdrawing money from this asset, just reporting it. I'm not sure how to report every stock and bond they manage for me, so I put the asset name under the SPY. I know this is not correct, but I cannot figure out how to properly report 401K holdings.					
Schwab Joint Investment Account ⇒ Enterprise Products Partners L.P. (EPD) [ST]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Description: Holding EPD in joint stock portfolio with spouse. Expected dividend payments through 2023.					
Schwab Joint Investment Account ⇒ Verizon Communications Inc. (VZ) [ST]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Description: Holding VZ in joint stock portfolio with spouse. Expected dividend payments through 2023.					
Schwab Joint Investment Account ⇒ Walgreens Boots Alliance, Inc. (WBA) [ST]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Description: Holding WBA in joint stock portfolio with spouse. Expected dividend payments through 2023.					
Spouse Investment Fund ⇒	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Dow Inc. (DOW) [ST] DESCRIPTION: Spouse's investment portfolio is holding a position in DOW in her E-Trade account					$1,000
Spouse Investment Fund ⇒ SPDR S&P 500 (SPY) [ST] DESCRIPTION: Spouse's investment porfolio is holding a position in SPY in her E-Trade account	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
Spouse Investment Fund ⇒ Vanguard Emerging Markets Government Bond ETF (VWOB) [ST] DESCRIPTION: Spouse's investment portfolio is holding a position in VWOB in her E-Trade account	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
Spouse Investment Fund ⇒ Vanguard High Dividend Yield ETF (VYM) [ST] DESCRIPTION: Spouse's investment portfolio is holding a position in VYM in her E-Trade account	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
Spouse Investment Fund ⇒ Vanguard S&P 500 ETF (VOO) [ST] DESCRIPTION: Spouse's investment portfolio is holding a position in VOO in her E-Trade account	SP	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Spouse Investment Fund ⇒ Vanguard Total Stock Market ETF (VTI) [ST] DESCRIPTION: Spouse's investment portfolio is holding a position in VTI in her E-Trade account	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
TD Ameritrade Investment Account ⇒ 3M Company (MMM) [ST] DESCRIPTION: MMM 2022 dividends = $261.85		$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
TD Ameritrade Investment Account ⇒ AT&T Inc. (T) [ST] DESCRIPTION: Dividends for AT&T stock in 2022 = $111		$1,001 - $15,000	Dividends	$201 - $1,000	$1 - $200
TD Ameritrade Investment Account ⇒ Cisco Systems, Inc. (CSCO) [ST] DESCRIPTION: Cisco dividends in 2022 = $95.33		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
TD Ameritrade Investment Account ⇒ Comcast Corporation - Class A (CMCSA) [ST] DESCRIPTION: Holding Comcast Corp in my stock portfolio with expected dividend payments through 2023		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
TD Ameritrade Investment Account ⇒ Cummins Inc. (CMI) [ST] DESCRIPTION: Cummins Inc 2022 dividends = $78.79		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TD Ameritrade Investment Account ⇒ Enterprise Products Partners L.P. (EPD) [ST] DESCRIPTION: Holding EPD in my stock portfolio with expected dividend payments through 2023		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
TD Ameritrade Investment Account ⇒ FedEx Corporation (FDX) [ST] DESCRIPTION: Fedex 2022 dividends = $23.06		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
TD Ameritrade Investment Account ⇒ Fortune Brands Home & Security, Inc. (FBHS) [ST] DESCRIPTION: FBHS dividends in 2022 = $60.45		$1,001 - $15,000	Dividends	None	$1 - $200
TD Ameritrade Investment Account ⇒ Huntington Ingalls Industries, Inc. (HII) [ST] DESCRIPTION: HII 2022 dividends = $47.33		$1,001 - $15,000	Dividends	None	$1 - $200
TD Ameritrade Investment Account ⇒ Huntington Ingalls Industries, Inc. (HII) [ST] DESCRIPTION: HII traded for $1,101.56 profit		$1,001 - $15,000	Capital Gains	None	$1,001 - $2,500
TD Ameritrade Investment Account ⇒ Leggett & Platt, Incorporated (LEG) [ST] DESCRIPTION: LEG 2022 dividends = $88.52		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
TD Ameritrade Investment Account ⇒ Magna International, Inc. (MGA) [ST] DESCRIPTION: MGA 2022 dividends = $90.15 Minus $13.53 for Foreign Tax withheld		$1,001 - $15,000	Dividends	None	$1 - $200
TD Ameritrade Investment Account ⇒ Omega Healthcare Investors, Inc. (OHI) [ST] DESCRIPTION: OHI 2022 dividends = $67		$1,001 - $15,000	Dividends	None	$1 - $200
TD Ameritrade Investment Account ⇒ Omega Healthcare Investors, Inc. (OHI) [ST] DESCRIPTION: Trade Omega Healthcare for $11.14 profit		$1,001 - $15,000	Capital Gains	None	$1 - $200
TD Ameritrade Investment Account ⇒ Pentair plc. Ordinary Share (PNR) [ST] DESCRIPTION: PNR 2022 dividends = $42.09		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
TD Ameritrade Investment Account ⇒ Rent-A-Center Inc. (RCII) [ST] DESCRIPTION: Traded RCII for $327.14 profit		$1,001 - $15,000	Capital Gains	None	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TD Ameritrade Investment Account ⇒ Stanley Black & Decker, Inc. (SWK) [ST] DESCRIPTION: SWK 2022 dividends = $100.38		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
TD Ameritrade Investment Account ⇒ Stellantis N.V. Common Shares (STLA) [ST] DESCRIPTION: STLA 2022 dividend = $168.89 minus $25.33 for foreign tax withheld		$1,001 - $15,000	Dividends	$201 - $1,000	$1 - $200
TD Ameritrade Investment Account ⇒ T. Rowe Price Group, Inc. (TROW) [ST] DESCRIPTION: TROW 2022 dividends = $144.96		$1,001 - $15,000	Dividends	$201 - $1,000	$1 - $200
TD Ameritrade Investment Account ⇒ The Cigna Group (CI) [ST] DESCRIPTION: Traded Cigna Corp for $3.90 profit		$1,001 - $15,000	Capital Gains	None	$1 - $200
TD Ameritrade Investment Account ⇒ The Cigna Group (CI) [ST] DESCRIPTION: Cigna dividends in 2022 = $33.65. Closed position in 2023.		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
TD Ameritrade Investment Account ⇒ VALE S.A. American Depositary Shares Each Representing one common share (VALE) [ST] DESCRIPTION: Traded VALE for $21.99 profit		$1,001 - $15,000	Capital Gains	None	$1 - $200
TD Ameritrade Investment Account ⇒ Verizon Communications Inc. (VZ) [ST] DESCRIPTION: VZ "qualified dividend" (reading from 2022 1099) = $75.04		$1,001 - $15,000	Dividends	$201 - $1,000	$1 - $200
TD Ameritrade Investment Account ⇒ Walgreens Boots Alliance, Inc. (WBA) [ST] DESCRIPTION: Holding Walgreens Corp in my stock portfolio with expected dividend payments through 2023		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable

* 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
Northrop Grumman Corp	Salary	$174,000.00	$170,000.00
Schindler Elevator	Spouse Salary	$175,000.00	$175,000.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Truist Bank	Jan 2021	Mortgage	$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

- Personal 401K
  Description: Personal 401K worth approximately $475K at time of reporting.
- Schwab Joint Investment Account (100% Interest) (Owner: JT)
  Description: Joint investment account candidate and spouse
- Spouse Investment Fund (100% Interest) (Owner: SP)
  Description: Spouse has money in various Vanguard ETFs and funds.
- TD Ameritrade Investment Account (100% Interest)
  Description: This is my personal TD Ameritrade Investment Account.

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: Brian Jones , 09/6/2023