Filing ID #10056875

Financial Disclosure Report

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Filer Information

Name: Mr. Tony Pombo
Status: Congressional Candidate
State/District: OH10

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 03/19/2024
Period Covered: 01/01/2023– 01/26/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
M-401K403b ⇒ T. Rowe Price Retirement 2045 Fund - I Class (TRIKX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		
M-401K403b ⇒ T. Rowe Price Retirement 2045 Fund - I Class (TRIKX) [MF]	SP	$50,001 - $100,000	Tax-Deferred		
M-401K403b ⇒ T. Rowe Price Retirement 2045 Fund - I Class (TRIKX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
M-Brokerage ⇒ American Balanced Fund, Class A Shs (ABALX) [MF]	SP	$15,001 - $50,000	Dividends	$201 - $1,000	$1,001 - $2,500
M-Checking [BA]	SP	$15,001 - $50,000	None		
M-IRA ⇒ Allspring Short-Term High Income Fund I (STYIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
M-IRA ⇒ Cash [BA]	SP	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
M-IRA ⇒ iShares Biotechnology ETF (IBB) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
M-IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
M-IRA ⇒ iShares MSCI Emerging Index Fund (EEM) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
M-IRA ⇒ JPMorgan Strategic Income Opportunities Fund I Class (JSOSX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
M-IRA ⇒ Neuberger Berman Long Short Fd Instl Cl (NLSIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
M-IRA ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]	SP	$1 - $1,000	Tax-Deferred		
M-IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
M-IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
M-IRA ⇒ Templeton Global Bond Fund Advisor Class (TGBAX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
M-IRA ⇒ Vanguard Consumer Discretion ETF (VCR) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
M-IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
M-IRA ⇒ Vanguard Industrials ETF (VIS) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
M-IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]	SP	$50,001 - $100,000	Tax-Deferred		
M-IRA ⇒ Vanguard Materials ETF (VAW) [EF]	SP	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
M-Savings [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
M-SavingsC [BA]	SP	$250,001 - $500,000	Interest	$5,001 - $15,000	$1,001 - $2,500
T-401K ⇒ Allspring Special Mid Cap Value Fund - R6 (WFPRX) [MF]		$1,001 - $15,000	Tax-Deferred		
T-401K ⇒ American Beacon SiM High Yield Opportunities Fd Inst Cl (SHOIX) [MF]		$15,001 - $50,000	Tax-Deferred		
T-401K ⇒ American Century Small Cap Growth Fund R6 Cl (ANODX) [MF]		$1,001 - $15,000	Tax-Deferred		
T-401K ⇒ Baird Mid Cap Growth Fund - Institutional Class (BMDIX) [MF]		$1,001 - $15,000	Tax-Deferred		
T-401K ⇒ Calvert Income Fund Class I (CINCX) [MF]		$1,001 - $15,000	Tax-Deferred		
T-401K ⇒ Dodge & Cox Global Bond Fund - Class I (DODLX) [MF]		$1,001 - $15,000	Tax-Deferred		
T-401K ⇒ Federated Hermes MDT Large Cap Growth Fund Institutional Class (QILGX) [MF]		$15,001 - $50,000	Tax-Deferred		
T-401K ⇒ MFS Institutional Investors Trust - MFS Institutional International Eq (MIEIX) [MF]		$15,001 - $50,000	Tax-Deferred		
T-401K ⇒ New World Fund, Inc. Cl R-6 (RNWGX) [MF]		$15,001 - $50,000	Tax-Deferred		
T-401K ⇒ PGIM US Real Estate Fund Class R6 (PJEQX) [MF]		$15,001 - $50,000	Tax-Deferred		
T-401K ⇒ PIMCO RAE US Small Fund Class INSTL (PMJIX) [MF]		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
T-401K ⇒ Putnam Large Cap Value Fund Class R6 (PEQSX) [MF]		$15,001 - $50,000	Tax-Deferred		
T-Brokerage ⇒ Cash [BA]		$50,001 - $100,000	Interest	$201 - $1,000	$201 - $1,000
T-Brokerage ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
T-Brokerage ⇒ iPath Series B S&P 500 VIX Short-Term Futures ETN (VXX) [ET]		$50,001 - $100,000	None		
T-Brokerage ⇒ Royal Caribbean Cruises Ltd. Common Stock (RCL) [ST]		$1,001 - $15,000	None		
T-Brokerage ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF]		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
T-Brokerage ⇒ SPDR S&P 500 (SPY) [EF]		$15,001 - $50,000	Dividends	$1 - $200	$1 - $200
T-Brokerage ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		$1,001 - $15,000	None		
T-Brokerage ⇒ United Airlines Holdings, Inc. - Common Stock (UAL) [ST]		$1,001 - $15,000	None		
T-Brokerage ⇒ Vanguard Health Care ETF (VHT) [EF]		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
T-Brokerage ⇒ Wynn Resorts, Limited - Common Stock (WYNN) [ST]		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
T-Checking [BA]		$50,001 - $100,000	Interest	$1 - $200	$1 - $200
T-Saving [BA]		$100,001 - $250,000	Interest	$1,001 - $2,500	$5,001 - $15,000
T-TIRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
T-TIRA ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF]		$1,001 - $15,000	Tax-Deferred		
T-TIRA ⇒ SPDR S&P 500 (SPY) [EF]		$15,001 - $50,000	Tax-Deferred		
T-TIRA ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		$1,001 - $15,000	None		

* Investment vehicle 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
Edict Systems	Salary	$28,887.95	$126,550.82
Premier Health Partners	Spouse Salary	N/A	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
December 2015	Tony Pombo, Edict Systems	Participation in employer 401k program

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Investment Vehicle Details

- M-401K403b (Owner: SP)
- M-Brokerage (Owner: SP)
- M-IRA (Owner: SP)
- T-401K

- T-Brokerage
- T-TIRA

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: Mr. Tony Pombo , 03/19/2024