Filing ID #10060459

Financial Disclosure Report

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

Filer Information

Name: Brad Knott
Status: Congressional Candidate
State/District: NC13

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 09/13/2024
Period Covered: 01/01/2023– 07/14/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab Brokerage Account 1 ⇒ Baytex Energy Corp Common Shares (BTE) [ST]		$1,000,001 - $5,000,000	Dividends	$5,001 - $15,000	$5,001 - $15,000
Description: The dividends were declared recently by Baytex - it amounts to roughly .07 / share.					
Charles Schwab Brokerage Account 1 ⇒ Global-E Online Ltd. - ordinary shares (GLBE) [ST]		$50,001 - $100,000	None		
Charles Schwab Brokerage Account 1 ⇒ Oramed Pharmaceuticals Inc. - Common Stock (ORMP) [ST]		$15,001 - $50,000	None		
Charles Schwab Brokerage Account 1 ⇒ Palantir Technologies Inc. Class A Common Stock (PLTR) [ST]		$1,001 - $15,000	None		
Charles Schwab Brokerage Account 2 ⇒ Avantis Emerging Markets Equity ETF (AVEM) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Charles Schwab Brokerage Account 2 ⇒ Avantis Emerging Markets Value ETF (AVES) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab Brokerage Account 2 ⇒ Avantis International Equity ETF (AVDE) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Charles Schwab Brokerage Account 2 ⇒ Avantis International Small Cap Value ETF (AVDV) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Charles Schwab Brokerage Account 2 ⇒ Avantis Real Estate ETF (AVRE) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Charles Schwab Brokerage Account 2 ⇒ Avantis U.S. Equity ETF (AVUS) [EF]		$15,001 - $50,000	Dividends	$201 - $1,000	Not Applicable
Charles Schwab Brokerage Account 2 ⇒ Avantis U.S. Large Cap Value ETF (AVLV) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Charles Schwab Brokerage Account 2 ⇒ Avantis U.S. Small Cap Value ETF (AVUV) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	Not Applicable
Child's Trust ⇒ Child's Trust [BA]	DC	$15,001 - $50,000	Interest	$201 - $1,000	$201 - $1,000
DESCRIPTION: This is our daughter's trust that is in cash and accruing interest. The cash is not invested, currently.					
Child's Trust ⇒ Child's Trust [BA]	DC	$15,001 - $50,000	Interest	$201 - $1,000	$201 - $1,000
DESCRIPTION: This account is for our second daughter - is also in cash alone, and is accruing interest.					
Mewbourne Oil Co. Investment ⇒ Mewbourne Oil Co. Investment [OT]	JT	$100,001 - $250,000	Dividends	$15,001 - $50,000	None
DESCRIPTION: Mewbourne Oil Co. Investment					
Personal Roth IRA ⇒ Toast, Inc. Class A Common Stock (TOST) [ST]		$250,001 - $500,000	Tax-Deferred		
DESCRIPTION: This ROTH IRA holds one stock.					
Real Estate Investment ⇒ Real Estate Investment [OT]	JT	$100,001 - $250,000	Distribution from real estate investment	$5,001 - $15,000	$5,001 - $15,000
DESCRIPTION: There is a 7% preferred return that is paid quarterly to investors.					
Spouse Roth IRA ⇒ Avantis Emerging Markets Equity ETF (AVEM) [EF]	SP	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Spouse Roth IRA ⇒ Avantis Emerging Markets Value ETF (AVES) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
Spouse Roth IRA ⇒ Avantis International Equity ETF (AVDE) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Spouse Roth IRA ⇒ Avantis International Small Cap Value ETF (AVDV) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
Spouse Roth IRA ⇒ Avantis Real Estate ETF (AVRE) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
Spouse Roth IRA ⇒ Avantis U.S. Equity ETF (AVUS) [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Spouse Roth IRA ⇒ Avantis U.S. Large Cap Value ETF (AVLV) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Spouse Roth IRA ⇒ Avantis U.S. Small Cap Value ETF (AVUV) [EF]	SP	$15,001 - $50,000	Tax-Deferred		

* 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
United States Government	Salary	N/A	$110,000.00
J Blaine LLC	Spouse Salary	N/A	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	First Citizens Bank	July, 2023	Mortgage	$500,001 - $1,000,000

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 Investment Vehicle Details

- Charles Schwab Brokerage Account 1
- Charles Schwab Brokerage Account 2
- Child's Trust (Owner: DC)
  Description: My daughter has a trust fund with First Citizen's Bank in Raleigh.
- Child's Trust (Owner: DC)
  Description: My second daughter has a trust fund that is held in First Citizen's in Raleigh, N.C.
- Mewbourne Oil Co. Investment (Owner: JT)
  Location: Tyler, TX, US
  Description: My wife and I have invested $200,000 into an investment fund with Mewbourne Energy.
- Personal Roth IRA
  Description: I have a Roth IRA that holds one equity - a stock. The account is held at Charles Schwab.
- Real Estate Investment (Owner: JT)
  Location: Raleigh, NC, US
  Description: My wife and I invested $100,000.00 into a real estate fund offered by Liberty Investment Partners.
- Spouse Roth 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: Brad Knott , 09/13/2024