Filing ID #10060959

Financial Disclosure Report

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

Filer Information

Name: Janelle Bynum
Status: Congressional Candidate
State/District: OR05

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 08/13/2024
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
Boeing Employees' Credit Union Checking 51 [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$201 - $1,000
Boeing Employees' Credit Union Savings 43 [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Charles Schwab Brokerage ⇒ BAGIX BAIRD AGGREGATE BOND INST [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	None
Charles Schwab Brokerage ⇒ BAGSX BAIRD AGGREGATE BOND INV [MF]	JT	None	Dividends	None	$2,501 - $5,000
Charles Schwab Brokerage ⇒ BAMBX BLACKROCK Systematic Multi-Strategy Fund Investor A Shares [MF]	JT	None	Dividends	None	$1 - $200
Charles Schwab Brokerage ⇒ BIMBX BLACKROCK Systematic Multi-Strategy Fund Institutional Shares [MF] Description: 2022 $4223.69	JT	$15,001 - $50,000	Dividends	None	$1,001 - $2,500
Charles Schwab Brokerage ⇒	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab Bank [BA]					
Charles Schwab Brokerage ⇒ DBLTX DOUBLELINE TOTAL RETURN Bond [MF]	JT	None	Dividends	None	$1,001 - $2,500
Charles Schwab Brokerage ⇒ DFAU Dimensional US Core ETF [EF]	JT	$50,001 - $100,000	Dividends	$201 - $1,000	$1,001 - $2,500
Charles Schwab Brokerage ⇒ DLTNX DOUBLELINE TOTAL RETURN [MF]	JT	None	Dividends	None	$201 - $1,000
Charles Schwab Brokerage ⇒ GSIMX Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares [MF]	JT	$15,001 - $50,000	Dividends	None	$201 - $1,000
Charles Schwab Brokerage ⇒ PTIAX PERFORMANCE TRUST STRATEGIC [MF]	JT	$15,001 - $50,000	Dividends	$1,001 - $2,500	$2,501 - $5,000
Charles Schwab Brokerage ⇒ SCHG Schwab US Large Cap ETF [EF]	JT	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Charles Schwab Brokerage ⇒ SDY SPDR S&P Dividend Fund ETF [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Charles Schwab Brokerage ⇒ SNOXX SCHWAB TREASURY OBLIG MONEY INV [OT] DESCRIPTION: Scwab treasury	JT	$1,001 - $15,000	Interest	$5,001 - $15,000	$5,001 - $15,000
Charles Schwab Brokerage ⇒ SPYG SPDR S&P Growth ETF [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$1 - $200
Charles Schwab Brokerage ⇒ VDIGX Vanguard Dividend Growth Fund Investor Shares [MF]	JT	None	Dividends	None	$201 - $1,000
Charles Schwab Brokerage ⇒ VIG VANGUARD DIVIDEND ETF [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Charles Schwab Brokerage ⇒ VTI VANGUARD TOTAL STOCK ETF [EF]	JT	$100,001 - $250,000	Dividends	$1,001 - $2,500	$2,501 - $5,000
Charles Schwab Brokerage ⇒ VXUS VANGUARD TOTAL INTERNTL ETF [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$1,001 - $2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: 1196.78 2022 642.50 2023 ytd					
Embold Credit Union Checking [BA]	JT	$1,001 - $15,000	None		
Embold Credit Union Savings [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Fidelity IRA ⇒ Fidelity Freedom 2045 FFFGX [MF]		$15,001 - $50,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity Govt Cash Reserves [MF]		$50,001 - $100,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity MidCap Value [MF]		$15,001 - $50,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity Select Const. & Housing [MF]		$15,001 - $50,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity Select Leisure [MF]		$15,001 - $50,000	Tax-Deferred		
Ivory Coast Management LLC [OL] LOCATION: Clackamas, OR, US DESCRIPTION: Restaurants	JT	$5,000,001 - $25,000,000	Operating Income	None	$100,001 - $1,000,000
JB Charles Schwab ⇒ JB Charles Schwab Bank [BA]		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
JB Charles Schwab ⇒ McDonald's Corporation (MCD) [ST]		$1 - $1,000	Dividends	$1 - $200	$1 - $200
JB Charles Schwab ⇒ Nike, Inc. (NKE) [ST]		$1 - $1,000	Dividends	$1 - $200	None
JB Equitable ⇒ EQ Capital Group Research [MF]		$1,001 - $15,000	Tax-Deferred		
JB Equitable ⇒ EQ Clear Bridge Large Cap Growth ESG [MF]		$1,001 - $15,000	Tax-Deferred		
JB Equitable ⇒ EQ Large Cap Core Managed Volatility [MF]		$1 - $1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JB Equitable ⇒ EQ Moderate Allocation [MF]		$1,001 - $15,000	Tax-Deferred		
JB Equitable ⇒ EQ Quality Bond Plus [MF]		$1,001 - $15,000	Tax-Deferred		
JB Equitable ⇒ EQ Value Equity [MF]		$1,001 - $15,000	Tax-Deferred		
JB Equitable ⇒ EQ/AB Small Cap Growth [MF]		$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/AB SMALL CAP GROWTH [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/CAPITAL GROUP RESEARCH [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/Common Stock Index [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/Core Plus Bond [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/Equity 500 Index [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/INTERNATIONAL EQUITY INDEX [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/INTERNATIONAL VALUE MANAGED VOLATILITY [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/LARGE CAP GROWTH MANAGED VOLATILITY [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/LARGE CAP VALUE MANAGED VOLATILITY [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒	SP	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
EQ/MID CAP VALUE MANAGED VOLATILITY [MF]					
MJB Equitable ⇒ EQ/Moderate Allocation [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/VALUE EQUITY [MF]	SP	$1,001 - $15,000	Tax-Deferred		
MJB Equitable ⇒ Multimanager Aggressive Equity [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Oregon College Savings Plan DC1 ⇒ College Enrollment Year 2038 [MF] DESCRIPTION: Dependent Child 1 529 Plan		$15,001 - $50,000	Tax-Deferred		
Oregon College Savings Plan DC2 ⇒ College Enrollment Year 2022 [MF] DESCRIPTION: Dependent Child 2 529 Plan		$15,001 - $50,000	Tax-Deferred		
Oregon College Savings Plan DC3 ⇒ College Enrollment Year 2027 [MF] DESCRIPTION: Dependent Child 3 529 plan		$15,001 - $50,000	Tax-Deferred		
Oregon College Savings Plan DC4 ⇒ College Enrollment Year 2028 [MF]		$15,001 - $50,000	Tax-Deferred		
Oregon Savings Growth Plan ⇒ Lifepath 2035 Fund [MF] DESCRIPTION: Oregon Savings Growth Plan		$50,001 - $100,000	Tax-Deferred		
Oregon Savings Growth Plan ⇒ LifePath 2040 Fund [MF]		$1,001 - $15,000	Tax-Deferred		
WF Checking [BA]	JT	$1,001 - $15,000	None		
WF Checking DC1 [BA]	DC	$1,001 - $15,000	None		
WF Checking DC2 [BA]	DC	$1,001 - $15,000	None		
WF Checking DC3 [BA]	DC	$1 - $1,000	None		
WF Checking DC4 [BA]	DC	$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
WF Savings [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
WF Savings DC1 [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
WF Savings DC2 [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
WF Savings DC3 [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
WF Savings DC4 [BA]	DC	$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
Ivory Coast Management	Salary-spouse	N/A	N/A
Ivory Coast Managment	Self-salary	$44,999.92	$50,000.00
State of Oregon	legislator salary	$35,000.00	$56,000.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bremer Bank	Jan 2022	Renovation Happy Valley	$250,001 - $500,000
	American Express	July 2023	Revolving Line of Credit	$10,000 - $15,000
	Boeing Employees' Credit Union Visa	July 2023	Revolving Credit	$10,000 - $15,000
JT	Bremer Bank	December 2022	Renovation JC	$500,001 - $1,000,000
JT	Bremer Bank	January 2021	Renovation Portland	$100,001 - $250,000
	Bremer Bank	April 2022	Vehicle	$50,001 - $100,000

SP	American Express	September 2022	Revolving Line of Credit	$15,001 - $50,000

Schedule E: Positions

Position	Name of Organization
Board Member	Grand Central Bakery

Schedule F: Agreements

Date	Parties To	Terms of Agreement
2023	Myself and the State of Oregon	Continued participation in Legislative Retirement Plan

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

Source (Name and Address)	Brief Description of Duties
Grand Central Bakery (Portland, OR, US)	Advisory board member

Schedule A Investment Vehicle Details

- Charles Schwab Brokerage (Owner: JT)
  Location: Happy Valley, OR, US
- Fidelity IRA
  Description: Fidelity Simple IRA
- JB Charles Schwab
  Location: Happy Valley, OR, US
  Description: JB Charles Schwab Acct
- JB Equitable
  Description: AXA plan
- MJB Equitable (Owner: SP)
  Description: AXA Plan
- Oregon College Savings Plan DC1
  Location: OR
- Oregon College Savings Plan DC2
  Location: OR
- Oregon College Savings Plan DC3
  Location: OR
- Oregon College Savings Plan DC4
  Location: OR
- Oregon Savings Growth Plan
  Description: State of Oregon Retirement Act

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: Janelle Bynum , 08/13/2024