Filing ID #10061919

Financial Disclosure Report

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Filer Information

Name: David R. Kennedy
Status: Congressional Candidate
State/District: VA08

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 06/11/2024
Period Covered: 01/01/2023– 04/15/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Citibank (Savings & Checking) [BA]		$100,001 - $250,000	Interest	$1 - $200	$2,501 - $5,000
Fidelity Investments ⇒ Akre Focus - Retail (AKREX) [MF] Description: SEP IRA, Spouse		$15,001 - $50,000	Capital Gains, Dividends, Interest	$1,001 - $2,500	$5,001 - $15,000
Fidelity Investments ⇒ Akre Focus Fund - Supra Institutional Class (AKRSX) [MF] Description: Roth IRA		$1,001 - $15,000	Capital Gains, Dividends, Interest	$201 - $1,000	$1,001 - $2,500
Fidelity Investments ⇒ Berkshire Hathaway Inc. Common Stock (BRK.A) [ST] Description: Rollover IRA, Spouse		$15,001 - $50,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	$15,001 - $50,000
Fidelity Investments ⇒ Fidelity Government Cash Reserves [GS] Description: Rollover IRA, Spouse		$15,001 - $50,000	Dividends, Interest	$201 - $1,000	$1,001 - $2,500
Fidelity Investments ⇒		$15,001 - $50,000	Dividends, Interest	$201 - $1,000	$1,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Government Cash Reserves [GS] DESCRIPTION: SEP IRA, Spouse					$2,500
Fidelity Investments ⇒ Fidelity Government Cash Reserves [GS] DESCRIPTION: Joint account with spouse		$1,001 - $15,000	Dividends, Interest	$1 - $200	$1,001 - $2,500
Fidelity Investments ⇒ Fidelity Government Cash Reserves [GS] DESCRIPTION: Joint account with daughter		$15,001 - $50,000	Dividends, Interest	$201 - $1,000	$1,001 - $2,500
Fidelity Investments ⇒ iShares Core MSCI EAFE ETF Option Class A (IOEAX) [MF] DESCRIPTION: Joint account with daughter		$1,001 - $15,000	Capital Gains, Dividends, Interest	$1,001 - $2,500	$2,501 - $5,000
Fidelity Investments ⇒ iShares Core MSCI EAFE ETF Option Class A (IOEAX) [MF] DESCRIPTION: Roth IRA		$1,001 - $15,000	Capital Gains, Dividends, Interest	$201 - $1,000	$201 - $1,000
Fidelity Investments ⇒ iShares Core S&P 500 ETF Option Class A (IOVAX) [MF] DESCRIPTION: Rollover IRA		$50,001 - $100,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	$15,001 - $50,000
Fidelity Investments ⇒ iShares Core S&P 500 ETF Option Class A (IOVAX) [MF] DESCRIPTION: Rollover IRA, Spouse		$100,001 - $250,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	$15,001 - $50,000
Fidelity Investments ⇒ Mid Cap SPDR 400 Trust, Series 1 (XMDYX) [MF] DESCRIPTION: Rollover IRA, Spouse		$100,001 - $250,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	$50,001 - $100,000
Fidelity Investments ⇒ Vanguard Bond Index Fund Total Bond Market Index Fd (VBMFX) [MF] DESCRIPTION: Rollover IRA, Spouse		$100,001 - $250,000	Capital Gains, Dividends, Interest	None	None
Fidelity Investments ⇒ Vanguard Bond Index Fund Total Bond Market Index Fd (VBMFX) [MF] DESCRIPTION: Rollover IRA		$50,001 - $100,000	Dividends, Interest	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Investments ⇒ Vanguard Developed Markets Index Investor (VDVIX) [MF] DESCRIPTION: Roth IRA		$1,001 - $15,000	Capital Gains, Dividends, Interest	$1 - $200	$201 - $1,000
Fidelity Investments ⇒ Vanguard Developed Markets Index Investor (VDVIX) [MF] DESCRIPTION: Rollover IRA		$50,001 - $100,000	Capital Gains, Dividends, Interest	$2,501 - $5,000	$5,001 - $15,000
Fidelity Investments ⇒ Vanguard Developed Markets Index Investor (VDVIX) [MF] DESCRIPTION: Rollover IRA, Spouse		$15,001 - $50,000	Capital Gains, Dividends, Interest	$1,001 - $2,500	$5,001 - $15,000
Fidelity Investments ⇒ Vanguard Index Trust - Growth Index Fund Institutional Shares (VIGIX) [MF] DESCRIPTION: Joint account with daughter		$15,001 - $50,000	Capital Gains, Dividends, Interest	$2,501 - $5,000	$5,001 - $15,000
National Geographic Society, Employee's Retirement Plan ⇒ National Geographic Society, Employee's Retirement Plan [DB] DESCRIPTION: Spouse is the beneficiary. Fund is managed by Milliman. Defined benefit payments or lump sum payout options are available. Amounts above are approximations.		$500,001 - $1,000,000	Capital Gains, Dividends, Interest	$2,501 - $5,000	$5,001 - $15,000
TIAA, 403(B) DC Plan ⇒ CREF Core Bond Account - Class R1 (QCBMRX) [MF]		$250,001 - $500,000	Capital Gains, Dividends, Interest	$2,501 - $5,000	$15,001 - $50,000
TIAA, 403(B) DC Plan ⇒ CREF Equity Index Account - R1 (QCEQRX) [MF]		$250,001 - $500,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	$50,001 - $100,000
TIAA, 403(B) DC Plan ⇒ CREF Global Equities Account - R1 (QCGLRX) [MF]		$100,001 - $250,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	$15,001 - $50,000
TIAA, 403(B) DC Plan ⇒ CREF Growth Account - R1 (QCGRRX) [MF]		$100,001 - $250,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	$50,001 - $100,000
TIAA, 403(B) DC Plan ⇒ CREF Money Market Account - R1 (QCMMRX) [MF]		$100,001 - $250,000	Interest	$1,001 - $2,500	$5,001 - $15,000
TIAA, 403(B) DC Plan ⇒ TIAA Real Estate Account (QREARX) [MF]		$15,001 - $50,000	Capital Gains, Dividends, Interest	None	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
Council on Government Relations (COGR)	Annual salary	$78,239.00	$222,381.00
Spouse, freelance and writer	Clients per the practice	N/A	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Mr. Cooper (Mortgage Company)	September 2023	Retirement home	$100,001 - $250,000

Schedule E: Positions

Position	Name of Organization
Treasurer	LMO Education Foundation
Treasurer	David R Kennedy for Congress

Schedule F: Agreements

Date	Parties To	Terms of Agreement
January 2006	David Kennedy and Council on Governmental Relations (my current employer).	Standard retirement plan offered to all employees by my employer.

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

None disclosed.

Schedule A Investment Vehicle Details

- Fidelity Investments
- National Geographic Society, Employee's Retirement Plan
  Description: Defined benefit plan, spouse
- TIAA, 403(B) DC Plan

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: David R. Kennedy , 06/11/2024