Filing ID #10062900

Financial Disclosure Report

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Filer Information

Name: Monique DeSpain
Status: Congressional Candidate
State/District: OR04

Filing Information

Filing Type: Amendment Report
Filing Year: 2024
Filing Date: 09/11/2024
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
Allianz 222 Annuity [FN]		$100,001 - $250,000	None		
Allianz 222 Annuity [FN] Description: IRA Fixed Annuity		$100,001 - $250,000	None		
Allianz Inherited IRA Accumulation Advantage Annuity [FN] Description: RMDs (mandatory withdrawals each year then taxed)		$100,001 - $250,000	RMD	$2,501 - $5,000	$2,501 - $5,000
Allianz Non-Qualified 222 Annuity [FN]		$50,001 - $100,000	None		
American Century Investment SIMPLE IRA [OT] Description: Simple IRA through employer Kevin Mannix PC Fund Number: 284 Ticker Symbol ARDRX Share Class R Class American Century Investments One Choice 2040 Portfolio: Investor Class: ARDVX I Class: ARDSX A Class: ARDMX C Class: ARNOX R Class: ARDRX R6: ARDUX		$15,001 - $50,000	None		
American Equity IRA Income Shield 10 Annuity [FN]		$100,001 - $250,000	None		
Bank of America checking and savings accts [BA]		$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
DESCRIPTION: Personal Household bank accounts					
Bank of America/Merrill Lynch 1 yr CD [BA] DESCRIPTION: CD matures in AUG 2024 ~ 5% interest CD		$15,001 - $50,000	Interest	None	None
Bank of America/Merrill MLPF FBO DECD IIRA [BA]		$100,001 - $250,000	RMD	$2,501 - $5,000	$2,501 - $5,000
Chase Bank CD [BA] DESCRIPTION: CD Matures Nov 2024		$100,001 - $250,000	Interest	None	None
Chase Bank Checking acct 1 [BA]		$15,001 - $50,000	Interest	$1 - $200	$1 - $200
Chase Bank Checking acct 2 [BA]		$1 - $1,000	Interest	$1 - $200	$1 - $200
Chase Bank Checking acct 3 [BA]		$15,001 - $50,000	Interest	$1 - $200	$1 - $200
Rental Property (1) [RP] LOCATION: Clark County, WA, US DESCRIPTION: Rental property renting at $2,300 per month		$250,001 - $500,000	Rent	$15,001 - $50,000	$15,001 - $50,000
Rental Property (2) [RP] LOCATION: Clark County, WA, US DESCRIPTION: Rental Income is $2425/month Gross annual income is $29100 net income varies with expenses.		$250,001 - $500,000	Rent	$15,001 - $50,000	$15,001 - $50,000
Robinhood account [OT] DESCRIPTION: Just for fun small investment account. Mostly crypto currency.		$1,001 - $15,000	None		
Schwab Individual Investment acct [OT] DESCRIPTION: Small investment acct. No income. BABA CAN FI RIOT SDGR		$1,001 - $15,000	None		
Schwab Managed IRA [OT] DESCRIPTION: Retirement acct. No income. SBFFX; APHJX; APHKX; BAGIX; BDSIX; CSDIX; COSSX; DEMIX; FPNIX; GEMIX; LCCEYX; JCBUX; JDEUX; MIEKX; PXTRX; PIMIX; PRRIX; PSTKX; PSLIX; PZIEX; PCCOX; TSCSX		$50,001 - $100,000	None		
Schwab Roth IRA [OT] DESCRIPTION: traditional ROTH IRA. No draws or income. SCHX (Schwab US Large Cap ETF)		$15,001 - $50,000	None		
Treasury Direct Series I Savings Bond [OT]		$1,001 - $15,000	Interest	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: No income. 5 year bond					

* 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
Law Firm of Kevin Mannix	income from my own work/salary	$40,000.00	$105,500.00
Allianz Fixed Income Inherited IRA	RMD Mandatory draws from inherited IRA	N/A	$3,952.12

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

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

None disclosed.

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: Monique DeSpain , 09/11/2024