Filing ID #10071856

Financial Disclosure Report

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Filer Information

Name: Ruth R. Fortune
Status: Congressional Candidate
State/District: CT01

Filing Information

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 07/31/2025
Period Covered: 01/01/2024– 07/01/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America Checking [BA]		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Bank of America Checking [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Bank of America Savings [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200
JPMorganChase Checking [BA]	SP	$1,001 - $15,000	Interest	$201 - $1,000	$1 - $200
JPMorganChase Savings [BA]	SP	$15,001 - $50,000	Interest	$1 - $200	$1 - $200
Legal & General Cash Balance Pension Plan [DB] COMMENTS: The Cash Balance is as of Jan. 1, 2025.	SP	$15,001 - $50,000	Tax-Deferred		
Legal & General Restricted Stock Units [RS]	SP	$1,001 - $15,000	Capital Gains, Dividends	$1,001 - $2,500	$201 - $1,000
Legal & General Restricted Stock Units (Vested) [RS]	SP	$1,001 - $15,000	Capital Gains, Dividends	$1,001 - $2,500	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
M&T Bank Checking [BA]	SP	$1 - $1,000	Interest	$201 - $1,000	$1 - $200
Prudential Cash Balance Pension Plan [DB]	SP	$15,001 - $50,000	Tax-Deferred		
COMMENTS: The Cash Balance is as of Jan. 1, 2025.					
Bank of America 401k ⇒ ACADIAN ALL WORLD EX-US EQUITY (CLASS D SHARES) (GGRRT) [OT]		$1,001 - $15,000	Tax-Deferred		
DESCRIPTION: The investment objective of the Fund is to seek long-term capital appreciation by investing primarily in common stocks of international issuers.					
Bank of America 401k ⇒ BLACKROCK EQUITY DIVIDEND FUND (CLASS M SHARES)(EDFMT) [OT]		$1,001 - $15,000	Tax-Deferred		
DESCRIPTION: The Equity Dividend Fund (the "Fund") generally seeks long-term total return and current income by investing and reinvesting in a portfolio of U.S. and non-U.S. securities, with a focus on dividend-paying securities issued by companies with large market capitalizations.					
Bank of America 401k ⇒ BLACKROCK GLOBAL ALLOCATION CIT (BLIFT) [OT]		$1,001 - $15,000	Tax-Deferred		
DESCRIPTION: The BlackRock Global Allocation Collective Fund F (the "Fund") seeks to provide high total investment returns through a fully managed investment policy consisting of U.S. and non-U.S. equity securities, fixed income securities and money market securities. When selecting investments, BTC considers various factors, including opportunities for equity or debt investments to increase in value, expected dividends and interest rates. The Fund generally seeks diversification across markets, industries,					
Bank of America 401k ⇒ Dodge & Cox Stock Fund - Class X (DOXGX) [MF]		$1,001 - $15,000	Tax-Deferred		
Bank of America 401k ⇒ LIFEPATH INDEX 2055 FUND (CLASS D SHARES) (BRK7T) [OT]		$15,001 - $50,000	Tax-Deferred		
DESCRIPTION: The LifePath® Index 2055 Fund (the "Fund") seeks to provide for retirement outcomes consistent with investor preferences throughout the savings and drawdown phase based on quantitatively measured risk that investors, on average, may be willing to accept.					
Bank of America 401k ⇒ PIMCO All Asset Fund Institutional Class (PAAIX) [MF]		$1,001 - $15,000	Tax-Deferred		
Bank of America 401k ⇒ T. Rowe Price Large-Cap Growth Fund Class I (TRLGX) [MF]		$100,001 - $250,000	Tax-Deferred		
DESCRIPTION: Actually listed as ticker JAQNT					
Bank of America 401k ⇒ VANGUARD INSTITUTIONAL 500 INDEX TRUST (VGINT) [OT]		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: The investment seeks to track the performance of the Standard & Poor's 500 Index that measures the investment return of large-capitalization stocks.					
Bank of America 401k ⇒ VANGUARD INSTITUTIONAL TOTAL BOND MARKET INDEX TRUST (VGITT) [OT]		$15,001 - $50,000	Tax-Deferred		
DESCRIPTION: The investment seeks to track the performance of the Bloomberg U.S. Aggregate Float Adjusted Index					
Bank of America 401k ⇒ VANGUARD INSTITUTIONAL TOTAL INTERNATIONAL STOCK MARKET INDEX TRUST (VGIST) [OT]		$15,001 - $50,000	Tax-Deferred		
DESCRIPTION: The investment seeks to track the performance of a benchmark index that measures the investment return of stocks issued by companies located in developed and emerging markets, excluding the United States.					
Czepiga Daly Pope & Perri 401k ⇒ American Funds 2060 Target Date Retirement Fund Class R-6 (RFUTX) [MF]		$15,001 - $50,000	Tax-Deferred		
Czepiga Daly Pope & Perri 401k ⇒ BlackRock Funds Mid-Cap Growth Equity Portfolio Institutional Shares (CMGIX) [MF]		$1,001 - $15,000	Tax-Deferred		
Czepiga Daly Pope & Perri 401k ⇒ T. Rowe Price Blue Chip Growth Fund - I Class (TBCIX) [MF]		$15,001 - $50,000	Tax-Deferred		
Czepiga Daly Pope & Perri 401k ⇒ Vanguard Balanced Index Fd Admiral Shs (VBIAX) [MF]		$1,001 - $15,000	Tax-Deferred		
Czepiga Daly Pope & Perri 401k ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]		$1,001 - $15,000	Tax-Deferred		
Czepiga Daly Pope & Perri 401k ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]		$1,001 - $15,000	Tax-Deferred		
Czepiga Daly Pope & Perri 401k ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]		$1,001 - $15,000	Tax-Deferred		
DC1 CHET Plan ⇒ CHET 529 Stable Value Port Vl I (FAIKX) [5F] LOCATION: CT	DC	$1,001 - $15,000	Tax-Deferred		
DC2 CHET Plan ⇒	DC	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CT Aggressive Growth (CTX100006) [5F] LOCATION: CT					
DC2 CHET Plan ⇒ CT Portfolio 2036 Fidelity Blend (CTB203606) [5F] LOCATION: CT	DC	$1,001 - $15,000	Tax-Deferred		
DC2 CHET Plan ⇒ CT Stable Value Portfolio (CTSV00006) [5F] LOCATION: CT	DC	$1,001 - $15,000	Tax-Deferred		
DC2 CHET Plan ⇒ CT Total Market Index (CTFSKAX07) [5F] LOCATION: CT	DC	$1,001 - $15,000	Tax-Deferred		
DC3 CHET Plan ⇒ CT Aggressive Growth (CT1000003) [5F] LOCATION: CT	DC	$15,001 - $50,000	Tax-Deferred		
DC3 CHET Plan ⇒ CT Moderate Growth (CT7000007) [5F] LOCATION: CT	DC	$1,001 - $15,000	Tax-Deferred		
Dow Jones 401k ⇒ FIAM U.S. Bond Index Commingled Pool Class D (31565J100) [OT] DESCRIPTION: The investment option is a collective investment trust. It is managed by Fidelity Institutional Asset Management.	SP	$15,001 - $50,000	Tax-Deferred		
Dow Jones 401k ⇒ Spartan 500 INDEX Pool Class D (84679P405) [OT] DESCRIPTION: This investment option is a Separate Fund ("Fund") established under a Declaration of Separate Funds ("DOSF") pursuant to the Declaration of Trust of the Spartan Group Trust for Employee Benefit Plans ("Trust"). It is managed by Geode Capital Management Trust Company, LLC, as trustee ("Geode").	SP	$50,001 - $100,000	Tax-Deferred		
Dow Jones 401k ⇒ Spartan REAL ESTATE Index Pool Class D (84679P330) [OT] DESCRIPTION: This investment option is a Separate Fund ("Fund") established under a Declaration of Separate Funds ("DOSF") pursuant to the Declaration of Trust of the Spartan Group Trust for Employee Benefit Plans ("Trust"). It is managed by Geode Capital Management Trust Company, LLC, as trustee ("Geode").	SP	$15,001 - $50,000	Tax-Deferred		
Dow Jones 401k ⇒ Spartan® Total International Index Pool Class D (84679P280) [OT]	SP	$50,001 - $100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: This investment option is a Separate Fund ("Fund") established under a Declaration of Separate Funds ("DOSF") pursuant to the Declaration of Trust of the Spartan Group Trust for Employee Benefit Plans ("Trust"). It is managed by Geode Capital Management Trust Company, LLC, as trustee ("Geode").					
Fidelity Roth IRA ⇒ Cash & Sweep Account [BA]		$1 - $1,000	Tax-Deferred		
Fidelity Roth IRA ⇒ SPDR S&P 500 (SPY) [EF]		$1 - $1,000	Tax-Deferred		
Legal & General Retirement Plan ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Legal & General Retirement Plan ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		
Merrill Lynch Brokerage Account ⇒ Merrill Lynch Brokerage Sweep Account [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Merrill Lynch Brokerage Account ⇒ SPDR S&P 500 (SPY) [EF]	JT	$250,001 - $500,000	Capital Gains, Dividends	$15,001 - $50,000	$50,001 - $100,000
Merrill Lynch Roth IRA ⇒ BlackRock Global Dividend Ptf Institutional (BIBDX) [MF]		$1,001 - $15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Cash & Sweep Account [BA]		$1 - $1,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		$15,001 - $50,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ New Perspective Fund, Class F-2 Shares (ANWFX) [MF]		$50,001 - $100,000	Tax-Deferred		
Prudential 401k ⇒ BlackRock Intnl Stk Idx (MSCI ACWI exUS) [OT]	SP	$50,001 - $100,000	Tax-Deferred		
DESCRIPTION: The Fund is an insurance company separate account under a group annuity contract issued by Empower Annuity Insurance Company (EAIC). It invests wholly in an underlying collective investment trust fund, BlackRock MSCI ACWI ex-US Index Fund (the "C.I.T."). The trust is maintained and managed by BlackRock Institutional Trust Company, N.A.					
Prudential 401k ⇒ BlackRock US Stock Index (Russell 3000) [OT]	SP	$100,001 - $250,000	Tax-Deferred		
DESCRIPTION: The Fund is a collective investment trust maintained and managed by BlackRock Institutional Trust Company, N.A. ("BTC").					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Prudential 401k ⇒ PFI Common Stock Fund (ESOP) Co Match 2 (PRU) [OT]	SP	$1,001 - $15,000	Tax-Deferred		
DESCRIPTION: The Prudential Financial, Inc. Common Stock Fund ("Stock Fund" or "Fund") primarily invests in Prudential Financial, Inc. common stock (for approximately 98% of the total value of the Fund) and short term investment funds or other liquid investments (for approximately 2% of the total value of the Fund) Prudential Financial, Inc. common stock is publicly traded on the New York Stock Exchange (NYSE) under the ticker symbol "PRU."					
Prudential 401k ⇒ Prudential Core Conservative Bond Fund [OT]	SP	$100,001 - $250,000	Tax-Deferred		
DESCRIPTION: The Fund invests wholly in the Prudential Trust Company Collective Trust ("Collective Trust"), which was formed to invest collectively and manage the assets of certain pension, profit-sharing, defined benefit or other retirement plans that are qualified under Section 401(a) (and exempt from taxation under section 501(a)) of the Internal Revenue Code of 1986, as amended. The Collective Trust has separate investment funds, including the Fund (the "Funds").					
Spouse HSA Investments ⇒ SPDR S&P 500 (SPY) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Spouse Roth IRA ⇒ Cash & Sweep Account [BA]	SP	$1,001 - $15,000	Tax-Deferred		
Spouse Roth IRA ⇒ SPDR S&P 500 (SPY) [EF]	SP	$250,001 - $500,000	Tax-Deferred		
Wiggin and Dana 401k ⇒ Vanguard Institutional Index (VINIX) [MF]		$50,001 - $100,000	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
Wiggin and Dana LLP	Salary	$102,863.31	$204,383.80
Legal & General of America	Spouse Salary	N/A	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

Position	Name of Organization
Position	Name of Organization
Associate	Wiggin and Dana LLP
Board Member	Hartford County Bar Association
Board Member, Board Vice President	Betty Knox Foundation
Board Member	Hartford Board of Education
Secretary	Estate & Business Planning Council (Hartford, CT)

Schedule F: Agreements

Date	Parties To	Terms of Agreement
June 2018	Ruth Fortune, Bank of America	Continued Participation in 401k Plan
May 2022	Ruth Fortune, Czepiga Daly Pope & Perri	Continued Participation in 401k Plan

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

None disclosed.

Schedule A Investment Vehicle Details

- Spouse Roth IRA (Owner: SP)
- Legal & General Retirement Plan (Owner: SP)
- Merrill Lynch Brokerage Account (Owner: JT)
- Dow Jones 401k (Owner: SP)
- Prudential 401k (Owner: SP)
- Czepiga Daly Pope & Perri 401k
- Fidelity Roth IRA
- Merrill Lynch Roth IRA
- Bank of America 401k
- Wiggin and Dana 401k
- DC1 CHET Plan (Owner: DC)
  Location: CT
- DC2 CHET Plan (Owner: DC)
  Location: CT
- DC3 CHET Plan (Owner: DC)
  Location: CT
- Spouse HSA Investments (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: Ruth R. Fortune , 07/31/2025