



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Mr. Brian Allen Montgomery
Status: Congressional Candidate
State/District: GA01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 12/23/2025
Period Covered: 01/01/2024– 11/23/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Dodge & Cox Stock Fund - Class X (DOXGX) [MF]	SP	None	Dividends	None	\$201 - \$1,000
Goldman Sachs ActiveBeta U.S. Large Cap Equity ETF (GSLC) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
iShares Core S&P 500 ETF (IVV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
JPMorgan SmartRetirement 2040 Fund - R6 (SMTYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Pimco CommodityRealReturn Strategy Fund Institutional Class (PCRIX) [MF]	SP	None	Dividends	None	\$201 - \$1,000
PIMCO Funds Total Return Fund Institutional Shares (PTTRX) [MF]	SP	None	Dividends	None	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Putnam High Yield Fund Class A (PHYIX) [MF]	SP	None	Dividends	None	\$1,001 - \$2,500
Secured Market Deposit Account [BA]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF]	SP	None	Dividends	None	\$201 - \$1,000
TCW Emerging Markets Income Fund N Class (TGINX) [MF]	SP	None	Dividends	None	\$1,001 - \$2,500
Vanguard Mid-Cap ETF (VO) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

* 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
Defense Finance and Accounting Service	Salary	N/A	\$114,457.00
American Anesthesiology of Georgia LLC	Spouse Salary	N/A	N/A
WiTricity Corporation	Salary	\$55,786.33	\$71,406.69
Defense Finance and Accounting Services - US Military Retired Pay	Pension	\$58,744.08	\$11,519.82

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	US Department of Education	April 2019	Student Loan	\$50,001 - \$100,000
SP	Wells Fargo	AUG 2016	Securities-Based Line of Credit	\$250,001 - \$500,000
	USAA	May 2020	Revolving Credit (Credit Card)	\$10,000 - \$15,000
	Chase	May 2020	Revolving Credit (Credit Card)	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	The Landings Military Family Relief Fund
General Manager	WITricity Corporation

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: Mr. Brian Allen Montgomery , 12/23/2025