



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Wes Climer  
**Status:** Congressional Candidate  
**State/District:** SC05

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2026  
**Filing Date:** 05/15/2026  
**Period Covered:** 01/01/2025– 04/15/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo Checking [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Climer Wealth Management Group of LPL Financial ⇒ Climer Wealth Management Group of LPL Financial [OL]		\$1,000,001 - \$5,000,000	None		
LOCATION: Charlotte, NC, US					
DESCRIPTION: Financial Advisory Business. Income reported in Schedule C.					
COMMENTS: Income Reported in Schedule C					
LPL Brokerage Account ⇒ American Funds SMALLCAP World A (SMCWX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
LPL Brokerage Account ⇒ Cash [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
LPL Brokerage Account ⇒ Invesco Advantage Muni Income Trust II (XVKIX) [MF]		\$15,001 - \$50,000	Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
LPL Brokerage Account ⇒ iShares 0-3 Month Treasury Bond ETF (SGOV) [EF]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LPL Brokerage Account ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
LPL Brokerage Account ⇒ JPMorgan Liquid Assets Money Market Fund Premier Shares (PJLXX) [MF]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
LPL Brokerage Account ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [EF]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
LPL Financial 401k ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
LPL Financial 401k ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
LPL Financial 401k ⇒ Global X S&P 500 Covered Call ETF (XYLD) [EF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
LPL Financial 401k ⇒ Harbor Capital Appreciation Fund Insti Cl (HACAX) [MF]		\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
LPL Financial 401k ⇒ SSGA S&P 500 Index Fd (SVSPX) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

\* 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
Climer Wealth Management Group of LPL Financial	Business Earnings	\$657,000.00	\$588,000.00
South Carolina Senate	Salary, In-District Expense, Per Diem	\$32,300.00	\$40,100.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Tristate Capital	December 2023	Securities Backed Line of Credit	\$250,001 - \$500,000
	Capital One	December 2025	Credit Card	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors	Historic Rock Hill Foundation
COMMENTS: Unpaid volunteer at 501(c)(3) organization	
Senator	SC Senate

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- LPL Financial 401k
- LPL Brokerage Account
- Climer Wealth Management Group of LPL Financial (50% Interest)  
LOCATION: Charlotte, NC, US

## 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:** Wes Climer , 05/15/2026