



Filing ID #10057692

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Patrick Bohan  
**Status:** Congressional Candidate  
**State/District:** CO07

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 04/26/2024  
**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
Bank of America Checking Account (Merril Lynch) [BA]  DESCRIPTION: Joint Checking Account	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$1 - \$200
Brighthouse Variable Annuity Class XC ⇒ American Growth Portfolio ⇒ Brighthouse Variable Annuity Class XC [PE]  DESCRIPTION: Spouses IRA Pension	SP	\$50,001 - \$100,000	Tax-Deferred		
Brighthouse Variable Annuity Class XC ⇒ Brighthouse Asset Allocation 60 Portfolio ⇒ Brighthouse Variable Annuity Class XC [PE]  DESCRIPTION: BrightHouse Asset Allocation 60 Assets make up about 47% of our Joint Annuity Account	JT	\$500,001 - \$1,000,000	Tax-Deferred		
Brighthouse Variable Annuity Class XC ⇒ Brighthouse Asset Allocation 80 Portfolio ⇒ Brighthouse Variable Annuity Class XC [PE]  DESCRIPTION: BrightHouse Asset Allocation 80 Assets make up about 53% of our Joint Annuity Account	JT	\$500,001 - \$1,000,000	Tax-Deferred		
Brighthouse Variable Annuity Class XC ⇒ Brighthouse Asset Allocation 80 Portfolio ⇒ Brighthouse Variable Annuity Class XC [PE]		\$500,001 - \$1,000,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Patrick Bohan IRA					

\* 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
Teachers Retirement System of Texas	Spouse	N/A	N/A
Brighthouse Annuity JT Account	Annuity	\$80,000.00	\$50,000.00

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
April 2007	Texas Instruments	Healthcare
June 2022	Texas Teachers Retirement System	Healthcare

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

None disclosed.

### SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"> <li>Brighthouse Variable Annuity Class XC (Owner: JT)</li> <li>Brighthouse Variable Annuity Class XC DESCRIPTION: Patrick Bohan IRA</li> <li>Brighthouse Variable Annuity Class XC (Owner: SP) DESCRIPTION: Spouse IRA</li> <li>Brighthouse Variable Annuity Class XC ⇒ American Growth Portfolio (Owner: SP) DESCRIPTION: American Growth Portfolio is an EIF made up of diversified mutual funds.</li> <li>Brighthouse Variable Annuity Class XC ⇒ Brighthouse Asset Allocation 60 Portfolio (Owner: JT) DESCRIPTION: Brighthouse Asset Allocation 60 is an EIF made up of diversified mutual funds.</li> <li>Brighthouse Variable Annuity Class XC ⇒ Brighthouse Asset Allocation 80 Portfolio</li> </ul>
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DESCRIPTION: Brighthouse Asset Allocation 80 is an EIF made up of diversified mutual funds.

- Brighthouse Variable Annuity Class XC ⇒ Brighthouse Asset Allocation 80 Portfolio (Owner: JT)

DESCRIPTION: Brighthouse Asset Allocation 80 is an EIF made up of diversified mutual funds.

## 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:** Patrick Bohan , 04/26/2024