



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Janak Joshi
Status: Congressional Candidate
State/District: COo8

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2024
Filing Date: 05/26/2024
Period Covered: 01/01/2023– 04/26/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab Corporation (SCHW) [ST]	JT	\$1,000,001 - \$5,000,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$100,001 - \$1,000,000
DESCRIPTION: Has various stocks and Mutual funds managed by asset managers					
Chochran [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Colorado Springs, CO, US					
CIBC [IH]		\$100,001 - \$250,000	Tax-Deferred		
Colorado PERA [PE]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Managed by Colorado State					
Fidelity [PE]		\$500,001 - \$1,000,000	Tax-Deferred		
DESCRIPTION: Managed by Fidelity					
SEI [RP]		\$500,001 - \$1,000,000	Rent	None	\$15,001 - \$50,000
LOCATION: Colorado Springs, CO, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SMSPSP [PE]		\$500,001 - \$1,000,000	Tax-Deferred		
DESCRIPTION: It is a profit share plan managed by CIBC					
SSI [OT]		Undetermined	Social Security	\$15,001 - \$50,000	\$50,001 - \$100,000
DESCRIPTION: Social Security					
Western Asset Intermediate Muni Fund Inc Common Stock (SBI) [ST]		\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Managed by US Wealth Management					
Western Asset Managed Municipals Fund Class A (SHMMX) [MF]	JT	\$100,001 - \$250,000	Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Managed by Morgan Stanley					

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of Colorado	Dec 2013	Mortgage on a office building	\$100,001 - \$250,000
JT	GM Financial	May 2021	Car Loan	\$15,001 - \$50,000
SP	One AZ Credit Union	Dec 2022	Car Loan	\$15,001 - \$50,000
JT	SBA	2020	Business Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
President	Colorado Community Clinic
President	Sewa International, Denver Colorado Chapter

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: Janak Joshi , 05/26/2024