



Filing ID #10056816

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Kari Lerner
Status: Congressional Candidate
State/District: FL19

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 02/26/2024
Period Covered: 01/01/2022– 12/17/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Accenture Retirement Investment Plan ⇒ Vanguard Index Trust Mid-Cap Index Fund Institutional Shares (VMCIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Accenture Retirement Investment Plan ⇒ Vanguard Target Retirement 2025 Fund (VTTVX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Coloredge Inc 401K Retirement Plan ⇒ Guaranteed Income Fund [OT] DESCRIPTION: Guaranteed Income Fund 401K		\$1,001 - \$15,000	Tax-Deferred		
DCU Money Market [BA] DESCRIPTION: Money Market Account Joint with spouse.	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
DCU Savings Account [OT] DESCRIPTION: Savings Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

* 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
Berkshire Hathaway Home Services Florida Realty - Watermark Realty, Inc.	Realtor Commissions	\$19,837.50	\$38,396.78
Avanade	Spouse Salary	\$33,083.32	\$200,296.88
Berkshire Hathaway HomeServices Verani Realty	Realtor Commission	\$3,547.50	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Nelnet	September 2014	Student Loan	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Realtor Sales Associate	Berkshire Hathaway HomeServices Florida Realty
Realtor Sales Associate	Berkshire Hathaway HomeServices Verani Realty

SCHEDULE F: AGREEMENTS

None disclosed.

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">Accenture Retirement Investment Plan (Owner: SP)Coloredge Inc 401K Retirement Plan DESCRIPTION: Prudential

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: Kari Lerner , 02/26/2024