



Filing ID #10056000

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: 2023
Filing Date: 01/4/2024

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]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Brighthouse Variable Annuity Class XC ⇒ American Growth Portfolio ⇒ Brighthouse Variable Annuity Class XC [OT] DESCRIPTION: Spouse's IRA	SP	\$50,001 - \$100,000	Tax-Deferred		
Brighthouse Variable Annuity Class XC ⇒ Brighthouse Asset Allocation 60 Portfolio ⇒ Brighthouse Variable Annuity Class XC, 47% Interest [OT] 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, 53% Interest [OT] DESCRIPTION: Joint Account	JT	\$500,001 - \$1,000,000	Tax-Deferred		
Brighthouse Variable Annuity Class XC ⇒ Brighthouse Asset Allocation 80 Portfolio ⇒ Brighthouse Variable Annuity Class XC [OT] DESCRIPTION: Patrick Bohan IRA		\$500,001 - \$1,000,000	Tax-Deferred		

* Asset class 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	\$50,000.00	\$42,000.00

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 ASSET CLASS DETAILS

<ul style="list-style-type: none">Brighthouse Variable Annuity Class XC (Owner: JT)Brighthouse Variable Annuity Class XC DESCRIPTION: Patrick Bohan IRABrighthouse Variable Annuity Class XC (Owner: SP) DESCRIPTION: Spouse IRABrighthouse Variable Annuity Class XC ⇒ American Growth Portfolio (Owner: SP) DESCRIPTION: American Growth Portfolio is an EIF made up of diversified mutual funds.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.Brighthouse Variable Annuity Class XC ⇒ Brighthouse Asset Allocation 80 Portfolio 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.
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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 , 01/4/2024