



Filing ID #10056095

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Joe Thelusca  
**Status:** Congressional Candidate  
**State/District:** FL23

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 12/12/2023  
**Period Covered:** 01/01/2022– 11/30/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley ⇒ Alerian MLP ETF (AMLX) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ BNS 10% Contingent Callable SPX [CS]  DESCRIPTION: Corporate Bonds	JT	\$1,001 - \$15,000	Capital Gains	None	None
Morgan Stanley ⇒ First Trust DJ Internet Index Fund (FDN) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Morgan Stanley ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Morgan Stanley ⇒ iShares Select Dividend ETF (DVY) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Morgan Stanley ⇒ Real Estate Select Sector SPDR Fund (XLRE) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Morgan Stanley ⇒ Royal Bank CDA SR GBL INDX 27 [CS]	JT	\$1 - \$1,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Corporate Bonds					
Morgan Stanley ⇒ Schwab US Dividend Equity ETF (SCHD) [ST]	JT	\$1,001 - \$15,000	Capital Gains	None	None
Morgan Stanley ⇒ SPDR Select Sector Fund - Financial (XLF) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Morgan Stanley ⇒ SPDR Select Sector Fund - Technology (XLK) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	None
Morgan Stanley ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Morgan Stanley ⇒ Cash ⇒ MSPBNA Preferred Savings [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1,001 - \$2,500
Wells Fargo Savings [BA]	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500

\* 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
ALLEGHENY EAST CONFERENCE	Salary:Self	\$56,869.00	\$62,040.00
ASBURY PARK BOARD OF EDUCATION	Spouse Salary	\$22,454.00	\$24,495.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	U.S Department of Education	Sept. 2013	Student Loan	\$100,001 - \$250,000

### SCHEDULE E: POSITIONS

None disclosed.

**SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

**SCHEDULE A ASSET CLASS DETAILS**

- Morgan Stanley (100% Interest) (Owner: JT)
- Morgan Stanley ⇒ Cash (100% Interest) (Owner: JT)  
LOCATION: 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:** Joe Thelusca , 12/12/2023