



Filing ID #10056321

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Ben Toma
Status: Congressional Candidate
State/District: AZo8

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 03/2/2024
Period Covered: 01/01/2023– 02/1/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Arizona Rental Property [RP]		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	\$50,001 - \$100,000
LOCATION: Peoria / Maricopa, AZ, US					
Blind Trust [OT]		\$250,001 - \$500,000	Partnership Income	Not Applicable	\$2,501 - \$5,000
DESCRIPTION: This blind trust was created as of 12/20/2023. Upon formation, Mr. Toma transferred all ownership interests in Black Mtn Inv Co LLC to the trust. Pursuant to the terms of the formation documents, Mr. Toma has neither control, nor a right to learn, of the trust's activities or transactions. Consequently, the accompanying valuation of trust assets is as of the trust's date of formation.					
State Provided 401(a) [OT]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: AZ State provided 401(a) plan					
Toma Partners LLC [OL]		\$100,001 - \$250,000	Partnership Distributions & Partnership Income	None	\$50,001 - \$100,000
LOCATION: Peoria / Maricopa, AZ, US					
DESCRIPTION: Real Estate Brokerage Business					
Units in Black Mtn Inv Co LLC [OT]		\$250,001 - \$500,000	Partnership Income	None	\$5,001 - \$15,000
DESCRIPTION: LLC Interest					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
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* 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
Toma Partners LLC	Salary	\$4,000.00	\$48,000.00
Toma Partners LLC	Salary	\$2,000.00	\$30,800.00
State of Arizona	Member of House of Representatives	\$2,213.66	\$26,779.89

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	CENLAR for Alaska Federal Credit Union	8/19/2022	Home equity line of credit	\$100,001 - \$250,000
	Chase Home Loans	4/18/2022	Home mortgage	\$500,001 - \$1,000,000
	Indymac Loan Services	11/29/2006	Home mortgage	\$250,001 - \$500,000
	Tucson Old Pueblo Credit Union	6/8/2020	Loan for solar panels	\$15,001 - \$50,000
	SBA	May 2020	EIDL Loan	\$100,001 - \$250,000
	Century 21	December 2015	Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Speaker of the House of Representatives	State of Arizona

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Elaine Ford (Scottsdale, AZ, US)	Realtor
Gregory & Catherine Wessel (Mesa, AZ, US)	Realtor
Trust of Micheline M Sarraill (Phoenix, AZ, US)	Realtor
Chadwick & Shannon Smith (Peoria, AZ, US)	Realtor
Sean & Hannah Wessel (Phoenix, AZ, US)	Realtor

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: Ben Toma , 03/2/2024