



Filing ID #10056172

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Sarah Elaine Albertson-Corkery
Status: Congressional Candidate
State/District: IA02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 02/14/2024
Period Covered: 01/01/2023– 01/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital One Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Corkery Creative, LLC [OL] LOCATION: Cedar Falls, IA, US DESCRIPTION: Creative design services	SP	\$1 - \$1,000	Business income	\$1,001 - \$2,500	\$50,001 - \$100,000
Fidelity Simple IRA ⇒ Fidelity Advisor Freedom 2040 Fund: Class Z6 (FKGLX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Fidelity Simple IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Simple IRA ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Iowa 529 College Savings Plan DC1 ⇒ Aggressive Growth Age-Based Track: Blended Aggressive Growth Portfolio [5P] LOCATION: IA		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Iowa 529 College Savings Plan DC1 ⇒ Aggressive Growth Age-Based Track: Blended Aggressive Growth Portfolio [5P] LOCATION: IA	SP	\$1,001 - \$15,000	Tax-Deferred		
Iowa 529 College Savings Plan DC2 ⇒ Growth Age-Based Track: Blended Moderate Growth Portfolio [5P] LOCATION: IA	SP	\$1,001 - \$15,000	Tax-Deferred		
Iowa 529 College Savings Plan DC2 ⇒ Growth Age-Based Track: Blended Moderate Growth Portfolio [5P] LOCATION: IA		\$15,001 - \$50,000	Tax-Deferred		
Iowa 529 College Savings Plan DC3 ⇒ Aggressive Growth Age-Based Track: Moderate Growth Portfolio [5P] LOCATION: IA	SP	\$1,001 - \$15,000	Tax-Deferred		
Iowa 529 College Savings Plan DC3 ⇒ Growth Age-Based Track: Conservative Growth Portfolio [5P] LOCATION: IA	SP	\$15,001 - \$50,000	Tax-Deferred		
Iowa 529 College Savings Plan DC3 ⇒ Growth Age-Based Track: Conservative Growth Portfolio [5P] LOCATION: IA		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Emerging Markets Portfolio I (DFEMX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Emerging Markets Small Cap Portf (DEMSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DFA Emerging Markets Value Portfolio (DFEVX) [MF]					
Schwab IRA ⇒ DFA Emerging Markets Value Portfolio (DFEVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Real Estate Securities Ptf (DFITX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Real Estate Securities Ptf (DFITX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Small Cap Value Portfolio (DISVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Value Portfolio (DFIVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Value Portfolio (DFIVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ DFA Large Cap International Portfolio (DFALX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Real Estate Securities Portfolio (DFREX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Real Estate Securities Portfolio (DFREX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Small Cap Portfolio (DFSTX) [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Large Cap Value Portfolio (DFLVX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Micro Cap Portfolio (DFSCX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA US Large Company Portfolio (DFUSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ FDIC Insured Bank Account [BA]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ Schwab Bank Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab Joint Brokerage Account ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000
Schwab Joint Brokerage Account ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
Schwab Joint Brokerage Account ⇒ FDIC Insured Bank Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Roth IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA Emerging Markets Portfolio I (DFEMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA Emerging Markets Small Cap Portf (DEMSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA Emerging Markets Value Portfolio (DFEVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Veridian Credit Union Accounts [BA]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$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
Veridian Credit Union	Salary, separation agreement	\$23,772.57	\$250,039.81

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Chief Marketing Officer	Corkery Creative LLC
Board member	Beau’s Beautiful Blessings
Director	Veridian Insurance
Commissioner	Cedar Falls Parks & Recreation
Board member	Inclusion Connection

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
July 2023	Myself, Veridian Credit Union	Confidential agreement related to separation benefits

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">◦ Fidelity Simple IRA (Owner: SP)◦ Iowa 529 College Savings Plan DC1 (Owner: SP) LOCATION: IA◦ Iowa 529 College Savings Plan DC1 LOCATION: IA◦ Iowa 529 College Savings Plan DC2 (Owner: SP) LOCATION: IA◦ Iowa 529 College Savings Plan DC2 LOCATION: IA◦ Iowa 529 College Savings Plan DC3 (Owner: SP) LOCATION: IA◦ Iowa 529 College Savings Plan DC3
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LOCATION: IA

- Schwab IRA (Owner: SP)
- Schwab IRA
- Schwab Joint Brokerage Account (Owner: JT)
LOCATION: US
- Schwab Roth IRA (Owner: SP)
- Schwab Roth IRA

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: Sarah Elaine Albertson-Corkery , 02/14/2024