



Filing ID #10056558

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Whitney Fox
Status: Congressional Candidate
State/District: FL13

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 02/12/2024
Period Covered: 01/01/2023– 01/21/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
12 Month Roth IRA Certificate [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
401(a) My Florida Retirement System ⇒ FRS 2050 Retirement Fund (2050) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Betterment Savings [BA] DESCRIPTION: High yield savings account	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
Bitcoin [OT] DESCRIPTION: Bitcoin sold for loss.	SP	\$1,001 - \$15,000	None		
Checking Account [BA] DESCRIPTION: Credit Union Checking Account	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	\$1 - \$200
Ethereum [OT] DESCRIPTION: Eth bought and sold on Coinbase for a loss.	SP	\$1,001 - \$15,000	None		
FCNTX [EF]	JT	\$1,001 - \$15,000	None		
FOCPX [EF]	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
House [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$1,001 - \$2,500	\$201 - \$1,000
LOCATION: St. Petersburg, FL, US DESCRIPTION: Renting upstairs ADU to family member.					
Jabil Inc. (JBL) [ST]	SP	\$1,001 - \$15,000	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: Old employee stock purchase grants					
MetLife policy 1 [WU]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
MetLife policy 2 [WU]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Sunrun Inc. (RUN) [ST]	SP	\$1,001 - \$15,000	None		
TRow - Nick 401K ⇒ T Rowe Price Retire 2050 TR F [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		
USFFCU IRA Savings [BA]		\$1 - \$1,000	Dividends	None	None
USFFCU Savings Account Soo [BA]	JT	\$1,001 - \$15,000	None		
USFFCU Savings Account So2 [BA]	JT	\$1,001 - \$15,000	None		
Vanguard Total Stock Market ETF (VTI) [ST]	JT	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Vanguard Total Stock Market ETF (VTI) [ST]	SP	\$1,001 - \$15,000	Dividends	None	\$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
Xos, Inc.	Spouse Salary	N/A	N/A
Alvarez & Marsal	Spouse Salary	N/A	N/A
Pinellas Suncoast Transit Authority	Salary	N/A	\$130,471.84

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Hancock Whitney Bank	April 2021	Mortgage on primary residence	\$500,001 - \$1,000,000

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 INVESTMENT VEHICLE DETAILS

- 401(a) My Florida Retirement System
- TRow - Nick 401K (Owner: SP)
DESCRIPTION: Nick 401K

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: Whitney Fox , 02/12/2024