



Filing ID #10071876

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Beth Andres-Beck  
**Status:** Congressional Candidate  
**State/District:** MA06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 10/30/2025  
**Period Covered:** 01/01/2024– 09/30/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
26 Week Treasury Bill [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	None
26 Week Treasury Bill [GS]		\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
29 Year 11 Month Treasury Bond [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
Aledade, Inc. [OP]		\$1 - \$1,000	None		
DESCRIPTION: stock incentive plan 4,062 options exercise price \$14.22 granted Sept. 27, 2024					
LTSE Group, Inc. [OP]		\$1,001 - \$15,000	None		
DESCRIPTION: Option Grant OP-7 grant date: 7/16/2019 vested exercisable: 114,889 exercise price per share: \$0.013 USD expiration date: 7/16/2029					
LTSE Group, Inc. [OP]		\$1 - \$1,000	None		
DESCRIPTION: Option Grant OP-8 grant date: 7/16/2019 vested exercisable: 8,571 exercise price per share: \$0.013 USD expiration date: 7/16/2029					
LTSE Group, Inc. [PS]		\$1 - \$1,000	None		
DESCRIPTION: Common Stock - 4018 shares					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LTSE Services, Inc. [OP]		\$1 - \$1,000	None		
DESCRIPTION: Option Grant OP-29 grant date: 7/13/2017 vested exercisable: 114,888 exercise price per share: \$0.21 USD expiration date: 7/13/2027					
LTSE Services, Inc. [OP]		\$1 - \$1,000	None		
DESCRIPTION: Option Grant OP-29 grant date: 7/13/2017 vested exercisable: 114,888 exercise price per share: \$0.21 USD expiration date: 7/13/2027					
LTSE Services, Inc. [PS]		\$1 - \$1,000	None		
DESCRIPTION: Series B Preferred Stock - 4018 shares					
Series I Savings Bond [GS]		\$15,001 - \$50,000	None		
Truffle Security Co. [PS]		\$1,001 - \$15,000	None		
DESCRIPTION: Angel investment in a cybersecurity company - 6,252 shares					
USAA Checking [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
USAA Checking - Joint with Partner [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Wealthfront Savings [BA]		\$500,001 - \$1,000,000	Interest	\$5,001 - \$15,000	\$15,001 - \$50,000
Aledade 401(k) Savings & Investment Plan ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Aledade 401(k) Savings & Investment Plan ⇒ Cohen & Steers Institutional Realty Shs Inc (CSRIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Aledade 401(k) Savings & Investment Plan ⇒ Morley Stable Value Fund Class 25-I [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: 401k stable value fund					
Aledade 401(k) Savings & Investment Plan ⇒ Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Aledade 401(k) Savings & Investment Plan ⇒ Vanguard Target Retirement 2050 Fund (VFIFX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
One Medical 401(k) ⇒ Vanguard Target Retirement 2050 Fund (VFIFX) [MF]		\$50,001 - \$100,000	Capital Gains	\$1 - \$200	\$1 - \$200
Tripadvisor 401(k) ⇒ BlackRock Total Return Fund BlackRock Class (MPHQX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Tripadvisor 401(k) ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
Tripadvisor 401(k) ⇒ Fidelity Extended Market Index Fund (FSMAX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Tripadvisor 401(k) ⇒ Vanguard Total Bond Market Index Fund Admiral Shares (VBTLX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard ⇒ Vanguard Extended Market Index Fd Admiral Shs (VEXAX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard ⇒ Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard ⇒ Vanguard Target Retirement 2050 Fund (VFIFX) [MF]		\$100,001 - \$250,000	Dividends	None	\$2,501 - \$5,000
Vanguard Individual 529 ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [5F]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
LOCATION: NV					
Vanguard Individual 529 ⇒ Vanguard Core Bond Portfolio [5F]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
LOCATION: NV					
Vanguard Individual 529 ⇒ Vanguard Total Bond Market Index Portfolio [5F]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: NV					
Vanguard Individual 529 ⇒ Vanguard Windsor Portfolio [5F]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
LOCATION: NV					
Wealthfront Brokerage ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Wealthfront Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Wealthfront Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wealthfront Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000

\* 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
1Life Healthcare, Inc.	Salary	N/A	\$258,609.00
Aledade Inc	Salary	\$209,107.27	\$80,004.00
Factor10	Speaking engagement	\$2,223.00	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JPMorgan Chase Bank, N.A.		February 2022	Mortgage on primary home	\$500,001 - \$1,000,000
FreedomRoadFinancial		September 2025	Financing for motorcycle purchase	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Member At-Large	Middleton Affordable Housing Trust
Member At-Large	Middleton Master Plan Committee
Senior Staff Engineer	Aledade, Inc.
Senior Staff Engineer	1Life Healthcare, Inc.
COMMENTS: Position held through September 2024.	

## **SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

## **SCHEDULE A INVESTMENT VEHICLE DETAILS**

- Vanguard
- Wealthfront Brokerage
- Vanguard Individual 529  
LOCATION: NV
- One Medical 401(k)
- Tripadvisor 401(k)
- Aledade 401(k) Savings & Investment Plan

## **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:** Beth Andres-Beck , 10/30/2025