



Filing ID #10009200

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** William Calvin Phillips Jr.  
**Status:** Congressional Candidate  
**State/District:** FL07

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2015  
**Filing Date:** 11/14/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Amalgamated Bank - #86015635		\$1,001 - \$15,000	None		
Amalgamated Bank 401K ⇒ American Funds 2040 Target Retire R4		\$1,001 - \$15,000	None		
Amalgamated Bank 401K ⇒ BlackRock S&P 500 Stock Institutional		\$1,001 - \$15,000	None		
Amalgamated Bank 401K ⇒ John Hancock Disciplined Value Mid Cap R4		\$1,001 - \$15,000	None		
Amalgamated Bank 401K ⇒ Nuveen Real Estate Securities I		\$1,001 - \$15,000	None		
Amalgamated Bank 401K ⇒ Oppenheimer Developing Markets Y		\$1,001 - \$15,000	None		
Bank of America - #229043369107		\$15,001 - \$50,000	None		
Bank of America - #229043369181		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jax Federal Credit Union - #56887		\$1 - \$1,000	None		
Merrill Lynch #612-12951		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

\* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Amalgamated Bank	Salary	\$120,000	\$90,000
Defero Advisory Services LLC	Managing Member	N/A	\$75,089

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Jax Federal Credit Union	June 2014	Personal Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Member	Defero Advisory Services LLC
First Vice President	Amalgamated Bank

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
BBB Funding LLC (Lakewood, CO, US)	Consulting Services
Southern Progress Foundation (Fayetteville, AR, US)	Consulting Services
NextGen Climate Action Committee (San Francisco, CA, US)	Consulting Services

## SCHEDULE A ASSET CLASS DETAILS

- Amalgamated Bank 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:** William Calvin Phillips Jr., 11/14/2015