



Filing ID #10018103

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Stephen Edward Fitzgerald
Status: Congressional Candidate
State/District: KS02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 11/8/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AMERICAN ARMED FORCES MUTUAL AID ASSN VALUE ADDED WHOLE LIFE		\$15,001 - \$50,000	None		
CHECKING/SAVINGS ACCOUNTS ⇒ CITIZENS SAVINGS AND LOAN CHECKING		\$1,001 - \$15,000	None		
CHECKING/SAVINGS ACCOUNTS ⇒ COUNTRY CLUB BANK CHECKING ACCOUNT		\$15,001 - \$50,000	None		
CHECKING/SAVINGS ACCOUNTS ⇒ USAA FEDERAL SAVINGS CHECKING		\$15,001 - \$50,000	None		
ETRADE ⇒ Ford Motor Company (F)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ETRADE ⇒ United Parcel Service, Inc. (UPS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ETRADE ⇒ Werner Enterprises, Inc. (WERN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
FITZGERALD ASSOCIATES LC ⇒		\$50,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1746 VILAS ST LEAVENWORTH KS		\$100,000			
LOCATION: LEAVENWORTH/LEAVENWORTH, KS, US					
Other Investment Accounts ⇒ CGM MUTUAL FUND		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Other Investment Accounts ⇒ FIDELLITY CONTRAFUND		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Other Investment Accounts ⇒ JANUS GLOBAL SELECT FUND D SHARES		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Other Investment Accounts ⇒ OAKMARK FUND INVESTOR CLASS		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Other Investment Accounts ⇒ TEMPLETON DEVELOPING MARKETS		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
SERIES EE SAVINGS BONDS		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$5,001 - \$15,000
Tax Deferred Accounts ⇒ KNIGHT OF COLUMBUS		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: SPOUSE ROTH					
Tax Deferred Accounts ⇒ KNIGHTS OF COLUMBUS		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: STEVE ROTH					
Tax Deferred Accounts ⇒ KNIGHTS OF COLUMBUS		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: STEVE TIRA					
Tax Deferred Accounts ⇒ KNIGHTS OF COLUMBUS		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: SPOUSE ROTH					
Tax Deferred Accounts ⇒ Northrop Grumman Corporation (NOC)		\$100,001 - \$250,000	Tax-Deferred		
Trust Company of Kansas Holdings ⇒ ALPHABET INC CLASS A		\$1,001 - \$15,000	Dividends	None	None
Trust Company of Kansas Holdings ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BLACKROCK HIGH YIELD BOND CLASS A					
Trust Company of Kansas Holdings ⇒ CASH DEPOSIT ACCOUNT TCK		\$1 - \$1,000	None		
Trust Company of Kansas Holdings ⇒ COGNIZANT TECHNOLOGY SOL		\$1,001 - \$15,000	Dividends	None	None
Trust Company of Kansas Holdings ⇒ COHEN & STEERS REAL ESTATE SECURITIES		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Trust Company of Kansas Holdings ⇒ FEDERATED GOVT OBLIGATIONS INST FD #5		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ FEDERATED TOTAL RETURN BOND INST SVC SHS		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ FIDELITY SELECT ENERGY		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ FMI INTERNATIONAL		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Trust Company of Kansas Holdings ⇒ GOLDMAN SACHS INFLATION PROTECTED SEC A		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ GOLDMAN SACHS STRATEGIC INCOME FUND CLASS A		None	Dividends	None	\$201 - \$1,000
Trust Company of Kansas Holdings ⇒ HENNESSY FOCUS INSTL		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ JANUS HENDERSON FLEXIBLE BOND I		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Trust Company of Kansas Holdings ⇒ JANUS TRITON FUND CLASS A		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ JP MORGAN EQUITY INCOME SELECT FUND		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Trust Company of Kansas Holdings ⇒ MFS INTERNATIONAL VALUE A		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Trust Company of Kansas Holdings ⇒ OPPENHEIMER DEVELOPING MARKETS		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ OPPENHEIMER INTERNATIONAL GROWTH A		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ OPPENHEIMER INTERNATIONAL SMALL MID CO		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ PIMCO COMMODITIES PLUS STRATEGY FUND A		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ PIMCO SHORT TERM A		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ SPDR GOLD TR		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ T ROWE BLUE CHIP GROWTH FUND ADVISOR CLASS		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ T ROWE PRICE QM US SMALL-CAP GROWTH EQUITY		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ UNDISCOVERED MANAGER BEHAVIORAL VALUE FUND CI		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
USAA ⇒ Boston Scientific Corporation (BSX)		\$1,001 - \$15,000	Dividends	None	None
USAA ⇒ Northrop Grumman Corporation (NOC)		\$1,001 - \$15,000	Dividends	None	None
USAA ⇒ USAA MONEY MARKET		\$1,001 - \$15,000	Interest	None	None

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
State of Kansas	Wages	\$7,000.00	\$14,353.00
AT&T Services Inc	Non Employee Compensation	\$.00	\$690.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	USAA	November 2016	Auto Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

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
STATE OF KANSAS (TOPEKA, KS, US)	KANSAS LEGISLATURE

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">CHECKING/SAVINGS ACCOUNTS LOCATION: USETRADE LOCATION: USFITZGERALD ASSOCIATES LC LOCATION: LEAVENWORTH/LEAVENWORTH, KS, USOther Investment Accounts LOCATION: USTax Deferred AccountsTrust Company of Kansas Holdings LOCATION: USUSAA LOCATION: US
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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: Stephen Edward Fitzgerald , 11/8/2017