



Filing ID #10020020

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Josh Welle
Status: Congressional Candidate
State/District: NJ04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 03/11/2018
Period Covered: 01/01/2017– 02/28/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Arlington, VA LOCATION: Arlington, VA, US DESCRIPTION: None	JT	\$500,001 - \$1,000,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
Fidelity IRA ⇒ Fidelity IRA - AMERICAN FUNDAMENTAL DESCRIPTION: AMERICAN FUNDAMENTAL INVESTORS CLASS A COMMENTS: None		\$15,001 - \$50,000	None		
Fidelity IRA ⇒ Fidelity IRA - FIDELITY ADVISOR FREEDOM DESCRIPTION: FIDELITY ADVISOR FREEDOM 2020 CL t A		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$15,001 - \$50,000
Fidelity IRA ⇒ Fidelity IRA - FIDELITY FREEDOM 2040 DESCRIPTION: FIDELITY FREEDOM 2040 COMMENTS: None		\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$15,001 - \$50,000
Fidelity IRA ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity IRA - LORD ABBETT					
DESCRIPTION: LORD ABBETT ALPHA STRATEGY CL A					
COMMENTS: None					
Fidelity IRA SP	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$2,501 - \$5,000
DESCRIPTION: FIDELITY FREEDOM FUND 2050					
Lake Como, NJ		\$250,001 - \$500,000	Rent	None	\$5,001 - \$15,000
LOCATION: Lake Como, NJ, US					
DESCRIPTION: Rental property					
COMMENTS: Asset sold in May 2017					
Rumson, NJ	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Rumson, NJ, US					
DESCRIPTION: None					
COMMENTS: None					
Vanguard Target Retirement 2025 TRSEL, 100% Interest	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
DESCRIPTION: Spouse 401(K)					
COMMENTS: None					
Virginia Beach, VA	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
LOCATION: Virginia Beach, VA, US					
DESCRIPTION: Rental property					
COMMENTS: 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
Severn Pacific Inc.	Salary	N/A	\$13,500.00
COMMENTS: Company dissolved in 2017			
Deloitte Consulting LLP	Spouse Salary	\$31,750.00	\$126,322.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Sun Trust Mortgage	May 2010	Mortgage on rental property	\$100,001 - \$250,000
	COMMENTS: Va Beach			
JT	US Bank	June 2016	Mortgage	\$250,001 - \$500,000
	COMMENTS: None			
JT	Wells Fargo Bank	June 2017	Mortgage	\$250,001 - \$500,000
	COMMENTS: None			
	Freedom Mortgage	May 2004	Mortgage on rental property	\$250,001 - \$500,000
	COMMENTS: Sold Lake Como, NJ property in May 2017			
JT	Chase Credit Card	Throughout 2017 - 2018	Credit card expenses	\$15,001 - \$50,000
	COMMENTS: None			

SCHEDULE E: POSITIONS

Position	Name of Organization
Partner	Pearl Harbor Partners LLC
COMMENTS: Dissolved in 2017	
CEO / Officer	Severn Pacific Inc.
COMMENTS: Dissolved in 2017	
Chairman and President	USNA Class of 2002 Inc.
COMMENTS: Stepped down in 2017	

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> Fidelity IRA
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DESCRIPTION: FIDELITY FREEDOM 2040

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: Josh Welle , 03/11/2018