



Filing ID #10019338

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Eddie J. Mauro  
**Status:** Congressional Candidate  
**State/District:** IA03

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 01/31/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allianz Life Insurance Co. ⇒ Nasdaq - 100 Index Allcoation	SP	\$1,001 - \$15,000	Tax-Deferred		
Allianz Life Insurance Co. ⇒ S&P 500 Index Allocation	SP	\$15,001 - \$50,000	Tax-Deferred		
American Funds Simple IRA ⇒ EuroPacific Growth Fund-A		\$1,001 - \$15,000	Tax-Deferred		
American Funds Simple IRA ⇒ Fundamental Investors-A		\$1,001 - \$15,000	Tax-Deferred		
American Funds Simple IRA ⇒ New Perspective Fund-A		\$1,001 - \$15,000	Tax-Deferred		
American Funds Simple IRA ⇒ The Growth Fund of America-A		\$1,001 - \$15,000	Tax-Deferred		
AssetMark ⇒ AQR Style Premia Alternative I - QSPIX	SP	\$1,001 - \$15,000	Tax-Deferred		
AssetMark ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AQR US Defensive Equity I - GBOSX					
AssetMark ⇒ BlackRock Liquidity T-Fund Mgmt	SP	\$1,001 - \$15,000	Tax-Deferred		
AssetMark ⇒ Cash Pending Settlement	SP	\$1 - \$1,000	Tax-Deferred		
AssetMark ⇒ iShares 0-5 Year High Yield Corp EFT - SHYG	SP	\$1,001 - \$15,000	Tax-Deferred		
AssetMark ⇒ JPMorgan Gbl Bond Opp I - GBOSX	SP	\$1,001 - \$15,000	Tax-Deferred		
AssetMark ⇒ Lazard US Global Listed Infrastrcture - GLIFX	SP	\$1,001 - \$15,000	Tax-Deferred		
AssetMark ⇒ Nuveen Preferred Securities and Inc I - NPSRX	SP	\$1,001 - \$15,000	Tax-Deferred		
AssetMark ⇒ Osterweis Strategic Income - OSTIX	SP	\$1,001 - \$15,000	Tax-Deferred		
AssetMark ⇒ PIMCO Income Instl - PIMIX	SP	\$1,001 - \$15,000	Tax-Deferred		
AssetMark ⇒ Savos Dynamic Hedging Fund - SVDHX	SP	\$1,001 - \$15,000	Tax-Deferred		
CollegeBound 529 Invesco College Bound Today Portfolio LOCATION: IA		\$15,001 - \$50,000	Tax-Deferred		
Collinwood Risk Services, Inc., 50% Interest  LOCATION: Des Moines, IA, US DESCRIPTION: Insurance		\$1,000,001 - \$5,000,000	Business	None	None
DomMia, Inc., 100% Interest  LOCATION: Des Moines, IA, US DESCRIPTION: Insurance Premium Financing		\$50,001 - \$100,000	Business	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Good Shift, LLC		\$50,001 - \$100,000	Business	None	None
LOCATION: Des Moines, IA, US DESCRIPTION: Technology Service					
JDET, Inc., 50% Interest		\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Des Moines, IA, US DESCRIPTION: Rental Real Estate					
Kestra ⇒ Apache Corporation (APA)		None	Dividends	\$1 - \$200	None
Kestra ⇒ Apple Inc. (AAPL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Kestra ⇒ AT&T Inc. (T)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Kestra ⇒ Dunkin' Brands Group, Inc. (DNKN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Kestra ⇒ Fidelity Govt MMKT Daily Money Class		\$1,001 - \$15,000	Interest	None	None
Kestra ⇒ Netflix, Inc. (NFLX)		\$1,001 - \$15,000	None		
Kestra ⇒ Oracle Corporation (ORCL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Kestra ⇒ Starbucks Corporation (SBUX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Kestra ⇒ Verizon Communications Inc. (VZ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Lincoln Financial 401(K) ⇒ AB VPS Small Mid Value SA39		\$15,001 - \$50,000	Tax-Deferred		
Lincoln Financial 401(K) ⇒ AmerFunds Invest Co Amer SA49		\$15,001 - \$50,000	Tax-Deferred		
Lincoln Financial 401(K) ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AmerFunds SMALLCAP World SA-46					
Lincoln Financial 401(K) ⇒ Dimensional Core Equity 1 SA11		\$15,001 - \$50,000	Tax-Deferred		
Lincoln Financial 401(K) ⇒ Fed Gov Ultrashort Dur SA14		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) ⇒ Franklin Growth SA58		\$15,001 - \$50,000	Tax-Deferred		
Lincoln Financial 401(K) ⇒ Guaranteed Account - Lincoln Financial		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) ⇒ Janus Aspen Enterprise SA64		\$15,001 - \$50,000	Tax-Deferred		
Lincoln Financial 401(K) ⇒ LVIP Clarion Gbl Real Est SA55		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) ⇒ LVIP Delaware Bond SA12		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) ⇒ LVIP Managed Risk PR 2030 SAL3		\$15,001 - \$50,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ AB VPS Small Mid Value SA39	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ AmerFunds Invest Co Amer SA49	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ Dimensional Core Equity 1 SA11	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ Fed Gov Ultrashort Dur SA14	SP	\$1 - \$1,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ Franklin Growth SA58	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ Franklin Growth SA58	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Lincoln Financial 401(K) - Sp ⇒ Franklin High Income SA20	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ Franklin Templeton Gbl Eqty SA62	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ Guaranteed Account - Lincoln Financial	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ LVIP Delaware Bond SA12	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ LVIP Managed Risk PR 2030 SAL3	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ LVIP SSgA Small-Cap Index SA36	SP	\$1,001 - \$15,000	Tax-Deferred		
Lincoln Financial 401(K) - Sp ⇒ MFS VIT Utilities Series SA67	SP	\$1,001 - \$15,000	Tax-Deferred		
Mass Mutual Roth IRA ⇒ MML Equity		\$1 - \$1,000	Tax-Deferred		
Mass Mutual Roth IRA ⇒ OPP Discovery Growth		\$1 - \$1,000	Tax-Deferred		
Mass Mutual Roth IRA ⇒ OPP Global Fund		\$1 - \$1,000	Tax-Deferred		
Mass Mutual Variable Annuity ⇒ MML Blend		\$1,001 - \$15,000	Tax-Deferred		
Mass Mutual Variable Annuity ⇒ MML Equity		\$1,001 - \$15,000	Tax-Deferred		
Mass Mutual Variable Annuity ⇒ OPP Discovery Growth		\$1,001 - \$15,000	Tax-Deferred		
Mass Mutual Variable Annuity ⇒ OPP Global Fund		\$1,001 - \$15,000	Tax-Deferred		
MDM Insurance Group, Inc., 100% Interest		\$500,001 - \$1,000,000	Interest, Business	\$2,501 - \$5,000	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Des Moines, IA, US DESCRIPTION: Insurance Agency					
Overtime Sports, LLC, 84% Interest		None	Capital Gains, Interest, Business	\$15,001 - \$50,000	None
LOCATION: Des Moines, IA, US DESCRIPTION: Recreational Sports					
Premier Credit Union Account #1	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Premier Credit Union Account #2	JT	\$1,001 - \$15,000	Interest	None	None
Principal Financial Group Inc (PFG)	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Rental Property - 508 Indianola, Des Moines, IA		\$250,001 - \$500,000	Rent	\$50,001 - \$100,000	\$15,001 - \$50,000
LOCATION: Des Moines, IA, US					
Rental Property - 520 Indianola, Des Moines, IA		\$15,001 - \$50,000	Rent	\$2,501 - \$5,000	\$1,001 - \$2,500
LOCATION: Des Moines, IA, US					
Rental Property - Herold Ave, Des Moines, IA		\$15,001 - \$50,000	Rent	\$15,001 - \$50,000	\$5,001 - \$15,000
LOCATION: Des Moines, IA, US					
SEM Insurance Brokers, Inc.		\$5,000,001 - \$25,000,000	Interest, Business	\$50,001 - \$100,000	\$15,001 - \$50,000
LOCATION: Des Moines, IA, US DESCRIPTION: Insurance					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Collinwood Risk Services	Salary	\$180,531.00	\$103,091.00
SEM Insurance Brokers	Salary	\$103,360.00	\$16,000.00
Des Moines Public Schools	Salary	\$4,895.00	\$4,793.00
MDM Insurance Brokers	Salary	\$40,000.00	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
DomMia, Inc.	Salary	\$15,000.00	N/A
Collinwood Risk Services	Spouse Salary	N/A	N/A
SEM Insurance Brokers	Spouse Salary	N/A	N/A

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of the West	October 1994	Home Mortgage	\$50,001 - \$100,000
JT	Premier Bank	October 2014	Home Equity Loan	\$15,001 - \$50,000
	Associated Bank	November 2008	Rental Property Loan	\$50,001 - \$100,000
	Vision Bank	July 2000	Rental Property Loan	\$100,001 - \$250,000
	West Bank	July 2014	Rental Property Loan	\$1,000,001 - \$5,000,000
	Premier Bank	September 2014	Auto Loan	\$10,000 - \$15,000
	Premier Bank	October 2017	Auto Loan	\$15,001 - \$50,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
Shareholder	Collinwood Risk Services
Shareholder	SEM Insurance Brokers, Inc.
Partner	JDET, LLC
Shareholder	MDM Insurance Group, Inc.
Partner	Overtime Sports, LLC
President / COO	Iowa Youth Sports
Partner	Good Shift, LLC
Shareholder	DomMia, Inc.

**SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

## **SCHEDULE A ASSET CLASS DETAILS**

- Allianz Life Insurance Co. (Owner: SP)
- American Funds Simple IRA
- AssetMark (Owner: SP)
- Kestra  
DESCRIPTION: DMM Investments
- Lincoln Financial 401(K)
- Lincoln Financial 401(K) - Sp (Owner: SP)
- Mass Mutual Roth IRA
- Mass Mutual Variable Annuity

## **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:** Eddie J. Mauro , 01/31/2018