



Filing ID #10019260

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Lena Rose Epstein
Status: Congressional Candidate
State/District: MI11

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 02/15/2018
Period Covered: 01/01/2016– 10/17/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allergan plc Ordinary Shares (AGN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Allstate Corporation (ALL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Alphabet Inc. - Class C Capital Stock (GOOG)		\$1,001 - \$15,000	None		
AMC Networks Inc. - Class A (AMCX)		\$1 - \$1,000	None		
Amerco (UHAL)		\$1,001 - \$15,000	None		
American Airlines Group, Inc. (AAL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
American Express Company (AXP)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
American International Group, Inc. New (AIG)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Anadarko Petroleum Corporation (APC)		\$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
Aon plc Class A Ordinary Shares (AON)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Apple Inc. (AAPL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Applied Materials, Inc. (AMAT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Archer-Daniels-Midland Company (ADM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Autodesk, Inc. (ADSK)		\$1,001 - \$15,000	None		
Bank of America Corporation (BAC)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Bank of New York Mellon Corporation (BK)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Bayer Aktiengesellschaft American Depositary Shares (BAYRY)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Berkshire Hathaway Inc. New (BRK.B)		\$1,001 - \$15,000	None		
Biogen Inc. (BIIB)		\$1,001 - \$15,000	None		
Bioverativ Inc. (BIVV)		\$1 - \$1,000	None		
Boeing Company (BA)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Bristol-Myers Squibb Company (BMY)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Broadcom Limited - Ordinary Shares (AVGO)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Capital One Financial Corporation (COF)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Carlisle Companies Incorporated (CSL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
CarMax Inc (KMX)		\$1,001 - \$15,000	None		
CBRE Group Inc Common Stock Class A (CBG)		\$1,001 - \$15,000	None		
CBS Corporation Class B (CBS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
CenturyLink, Inc. (CTL)		\$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
Chevron Corporation (CVX)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Cisco Systems, Inc. (CSCO)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Citigroup, Inc. (C)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Citrix Systems, Inc. (CTXS)		\$1,001 - \$15,000	None		
Colgate-Palmolive Company (CL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Comcast Corporation - Class A (CMCSA)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ConocoPhillips (COP)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Consolidated Edison, Inc. (ED)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Cree, Inc. (CREE)		\$1,001 - \$15,000	None		
CVS Health Corporation (CVS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Delta Air Lines, Inc. (DAL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Devon Energy Corporation (DVN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Discovery Communications, Inc. - Series A (DISCA)		\$1,001 - \$15,000	None		
Dolby Laboratories (DLB)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Ensco plc Class A Ordinary Shares (ESV)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Entergy Corporation (ETR)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fluor Corporation (FLR)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Franklin Resources, Inc. (BEN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Freeport-McMoRan, Inc. (FCX)		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
General Dynamics Corporation (GD)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
General Motors Company (GM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs Group, Inc. (GS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Halliburton Company (HAL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Harley-Davidson, Inc. (HOG)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Hartford Financial Services Group, Inc. (HIG)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
HCA Healthcare, Inc. (HCA)		\$1,001 - \$15,000	None		
ImmunoGen, Inc. (IMGN)		\$1,001 - \$15,000	None		
Intel Corporation (INTC)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
International Business Machines Corporation (IBM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Ionis Pharmaceuticals, Inc. (IONS)		\$1,001 - \$15,000	None		
Jacobs Engineering Group Inc. (JEC)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Johnson & Johnson (JNJ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Johnson Controls International plc Ordinary Share (JCI)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JP Morgan Chase & Co. (JPM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Kohl's Corporation (KSS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
L3 Technologies, Inc. (LLL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Lear Corporation (LEA)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Leucadia National Corporation (LUK)		\$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
Liberty Broadband Corporation - Class A (LBRDA)		\$1 - \$1,000	None		
Liberty Broadband Corporation - Class C (LBRDK)		\$1 - \$1,000	None		
Liberty Interactive Corporation - Series A Liberty Ventures (LVNTA)		\$1 - \$1,000	None		
Liberty Interactive Corporation - Series A QVC Group (QVCA)		\$1,001 - \$15,000	None		
Liberty Media Corporation - Series A Liberty Braves (BATRA)		\$1 - \$1,000	None		
Liberty Media Corporation - Series A Liberty Formula One (FWONA)		\$1 - \$1,000	None		
Liberty Media Corporation - Series A Liberty SiriusXM (LSXMA)		\$1 - \$1,000	None		
Liberty Media Corporation - Series C Liberty Braves (BATRK)		\$1 - \$1,000	None		
Liberty Media Corporation - Series C Liberty Formula One (FWONK)		\$1 - \$1,000	None		
Liberty Media Corporation - Series C Liberty SiriusXM (LSXMK)		\$1,001 - \$15,000	None		
Lions Gate Entertainment Corporation Class B Non-Voting Shares (LGF.B)		\$1 - \$1,000	None		
LogMein, Inc. (LOGM)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Marathon Oil Corporation (MRO)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Mastercard Incorporated (MA)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
McKesson Corporation (MCK)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Medtronic plc. Ordinary Shares (MDT)		\$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
MetLife, Inc. (MET)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Murphy Oil Corporation (MUR)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
National Oilwell Varco, Inc. (NOV)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Newell Brands Inc. (NWL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Noble Corporation Ordinary Shares (NE)		\$1 - \$1,000	None		
NOW Inc. (DNOW)		\$1,001 - \$15,000	None		
Nuance Communications, Inc. (NUAN)		\$1,001 - \$15,000	None		
Nucor Corporation (NUE)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Occidental Petroleum Corporation (OXY)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Pentair plc. Ordinary Share (PNR)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Pfizer, Inc. (PFE)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Public Service Enterprise Group Incorporated (PEG)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Quanta Services, Inc. (PWR)		\$1,001 - \$15,000	None		
Robert Half International Inc. (RHI)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
RPM International Inc. (RPM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schlumberger N.V. (SLB)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Seagate Technology PLC - Ordinary Shares (STX)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Selkirk		\$1 - \$1,000	None		
DESCRIPTION: Selkirk - Vacant land, Detroit, MI					
Snap-On Incorporated (SNA)		\$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
State Street Corporation (STT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TE Connectivity Ltd. New Switzerland Registered Shares (TEL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TechnipFMC plc Ordinary Share (FTI)		\$1 - \$1,000	None		
Twitter, Inc. (TWTR)		\$1,001 - \$15,000	None		
United Parcel Service, Inc. (UPS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UnitedHealth Group Incorporated Common Stock (UNH)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
V.F. Corporation (VFC)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Valmont Industries, Inc. (VMI)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vertex Pharmaceuticals Incorporated (VRTX)		\$1,001 - \$15,000	None		
Vesco Oil Co		\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
DESCRIPTION: Vesco Oil Co					
Vesco Oil Employer 401(k) plan ⇒ Columbia Dividend Income		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Franklin Total Return		\$1,001 - \$15,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Hotchkis and Wiley Small Cap		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Janus Henderson Enterprise		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ MFS Growth		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ MFS International Value		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vesco Oil Employer 401(k) plan ⇒ Oak Ridge Small Cap Growth		\$1,001 - \$15,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Oppenheimer International Growth		\$15,001 - \$50,000	Tax-Deferred		
Vesco Oil Employer 401(k) plan ⇒ Victory Sycamore Established Value		\$15,001 - \$50,000	Tax-Deferred		
Visible Solutions		\$1 - \$1,000	Royalties from IP	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: Visible Solutions					
Walgreens Boots Alliance, Inc. (WBA)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Walt Disney Company (DIS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Weatherford International plc (WFT)		\$1,001 - \$15,000	None		
Wells Fargo & Company (WFC)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Western Digital Corporation (WDC)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Whirlpool Corporation (WHR)		\$1,001 - \$15,000	Dividends	\$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
Vesco Oil Co	Salary	\$193,000.00	\$230,000.00
Heaven Hill Distilleries	Spouse salary	N/A	N/A
Proximo Spirits	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Detroit Historical Society
Director	Community Foundation of South East Michigan
Director	Detroit Regional Chamber of Commerce
Director	Jewish Community Center
Director	Kadima

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2018	Lena Epstein and Vesco Oil Co 401(k) Plan	Continuing participation in Vesco Oil Co 401(k) Plan

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- o Vesco Oil Employer 401(k) 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: Lena Rose Epstein , 02/15/2018