



Filing ID #10010898

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Charles Patteson Cardwell IV  
**Status:** Congressional Candidate  
**State/District:** VA02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2016  
**Filing Date:** 05/4/2016

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset                                       | Owner | Value of Asset        | Income Type(s)            | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|---------------------------|-------------------------------|-----------------------|
| 401k plan at Merrill Lynch                  |       | \$100,001 - \$250,000 | None                      |                               |                       |
| DESCRIPTION: 401k at Merrill Lynch          |       |                       |                           |                               |                       |
| PowerShares QQQ Trust, Series 1 (QQQ)       |       | \$50,001 - \$100,000  | Dividends                 | \$1 - \$200                   | \$201 - \$1,000       |
| DESCRIPTION: dividends reinvested           |       |                       |                           |                               |                       |
| Putnam Managed Municipal Income Trust (PMM) |       | \$15,001 - \$50,000   | Dividends                 | \$201 - \$1,000               | \$1,001 - \$2,500     |
| DESCRIPTION: reinvested dividends           |       |                       |                           |                               |                       |
| SPDR S&P 500 (SPY)                          |       | \$100,001 - \$250,000 | Dividends                 | \$1,001 - \$2,500             | \$2,501 - \$5,000     |
| DESCRIPTION: dividend reinvestment          |       |                       |                           |                               |                       |
| vanguard money market                       |       | \$50,001 - \$100,000  | Dividends                 | \$1 - \$200                   | \$1 - \$200           |
| DESCRIPTION: dividends                      |       |                       |                           |                               |                       |
| vanguard 529c                               |       | \$15,001 - \$50,000   | Capital Gains, Dividends, | \$201 - \$1,000               | \$1,001 - \$2,500     |

| Asset  | Owner | Value of Asset        | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| LOCATION: NJ   |       |                       | Interest       |                               |                       |
| Zippy Shell LLC., Common Stock   |       | \$250,001 - \$500,000 | None           |                               |                       |
| DESCRIPTION: own approximately 18,000 shares. Less than 1 percent of common stock. |       |                       |                |                               |                       |

SCHEDULE C: EARNED INCOME

| Source                                       | Type   | Amount Current Year to Filing | Amount Preceding Year |
|--|--------|-------------------------------|-----------------------|
| Employer and in spouse case employer as well | salary | \$145,000                     | \$160,000             |

SCHEDULE D: LIABILITIES

| Owner | Creditor                             | Date Incurred | Type        | Amount of Liability   |
|-------|--------------------------------------|---------------|-------------|-----------------------|
|       | BB&T Mortgage                        | November 2013 | Mortgage    | \$250,001 - \$500,000 |
| SP    | Navy Federal                         | 2011          | Mortgage    | \$250,001 - \$500,000 |
|       | Chase United Credit Card Master Card | 2016          | Credit Card | \$15,001 - \$50,000   |
| SP    | Visa                                 | 2016          | credit card | \$10,000 - \$15,000   |
|       | hyundau                              | October 2015  | 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                |
|---|--|
| Zippy Shell Incorporate (Wasington, DC, US) | General franchise legal and corporate work |

## 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:** Charles Patteson Cardwell IV, 05/4/2016