



Filing ID #10009407

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** David Orenticher  
**Status:** Congressional Candidate  
**State/District:** INo8

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2015  
**Filing Date:** 04/2/2016

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apache Corporation (APA)	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Apple Inc. (AAPL)	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
General Mills, Inc. (GIS)	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
IRA ⇒ Fidelity Government Money Market	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
IRA ⇒ Fidelity Government Money Market		\$1,001 - \$15,000	Dividends	None	None
IRA ⇒ Oakmark Select	SP	\$50,001 - \$100,000	Dividends	None	\$1 - \$200
IRA ⇒ Schwab S&P 500 Index Fund		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
IRA ⇒ Vulcan Value Partners Small Cap		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Israel Bond	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
IU 457(b) ⇒ AQR Managed Futures Fund		\$100,001 - \$250,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
IU 457(b) ⇒ Oakmark International		\$50,001 - \$100,000	None		
IU 457(b) ⇒ Schwab Fundamental US Large Co Index	SP	\$100,001 - \$250,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
IU 457(b) ⇒ Scout Core Plus Bond Fund		\$50,001 - \$100,000	Dividends	\$1 - \$200	None
IU ER 403(b) ⇒ Fidelity Spartan 500 Index		\$250,001 - \$500,000	Dividends	None	\$5,001 - \$15,000
IU ER 403(b) ⇒ Fidelity Total Bond Fund		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
IU ER 403(b) ⇒ Fidelity Total Bond Fund	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
IU SERP ⇒ Fidelity Total Bond Fund	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
IU SERP ⇒ Fidelity Total Bond Fund		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
IU TDA ⇒ Delaware US Growth		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
IU TDA ⇒ Fidelity Government Cash Reserves	SP	\$1,001 - \$15,000	None		
IU TDA ⇒ IVA Worldwide Fund	SP	\$100,001 - \$250,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
IU TDA ⇒ JP Morgan Inflation Managed Bond		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
IU TDA ⇒ RS Global Natural Resources Fund		\$100,001 - \$250,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IU TDA ⇒ Scout Core Plus Bond Fund	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
IU TDA ⇒ Vulcan Value Partners Small Cap		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
IU TDA ⇒ William Blair Macro Allocation Fund		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
Joint Funds ⇒ Artisan International	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Joint Funds ⇒ Schwab S&P 500	JT	\$50,001 - \$100,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Joint Stock ⇒ Apache Corporation (APA)	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Joint Stock ⇒ Apple Inc. (AAPL)	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Joint Stock ⇒ Estee Lauder Companies, Inc. (EL)	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Stock ⇒ InterOil Corporation (IOC)	JT	\$1,001 - \$15,000	None		
Joint Stock ⇒ Microsoft Corporation (MSFT)	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Joint Stock ⇒ Monsanto Company (MON)	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Stock ⇒ QUALCOMM Incorporated (QCOM)	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Joint Stock ⇒ Simon Property Group, Inc. (SPG)	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
Marriot Vacations Worldwide Corporation (VAC)	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
QUALCOMM Incorporated (QCOM)	DC	\$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
Residence	JT	\$250,001 - \$500,000	None		
LOCATION: Indianapolis/Marion, IN, US					
Rollover IRA ⇒ Alerian MLP Infrastructure		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	None
Rollover IRA ⇒ Artisan International		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
Rollover IRA ⇒ Causeway International Value		\$100,001 - \$250,000	Dividends	None	\$2,501 - \$5,000
Rollover IRA ⇒ Delaware US Growth		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Rollover IRA ⇒ Dodge and Cox Income		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Rollover IRA ⇒ Fidelity Government Money Market		\$15,001 - \$50,000	Dividends	None	\$1 - \$200
Rollover IRA ⇒ Matthew Asian Growth and Income		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
Rollover IRA ⇒ Oakmark International		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
Rollover IRA ⇒ Oakmark Select		\$15,001 - \$50,000	Dividends	None	\$1 - \$200
Savings	DC	\$1,001 - \$15,000	Interest	\$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
Indiana University	Wages	\$193,393	\$196,893
Indiana University	Spouse wages	\$76,783	\$76,437

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Gannett	Newspaper columns	N/A	\$825
Wolters Kluwer Publishing	Book Royalties	\$3,800	\$3,938

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Sun Mortgage	November 2010	Home Mortgage	\$100,001 - \$250,000

**SCHEDULE E: POSITIONS**

None disclosed.

**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"> <li>◦ IRA</li> <li>◦ IRA (Owner: SP)</li> <li>◦ IU 457(b)</li> <li>◦ IU 457(b) (Owner: SP)</li> <li>◦ IU ER 403(b)</li> <li>◦ IU ER 403(b) (Owner: SP)</li> <li>◦ IU SERP</li> <li>◦ IU SERP (Owner: SP)</li> <li>◦ IU TDA</li> <li>◦ IU TDA (Owner: SP)</li> <li>◦ Joint Funds (Owner: JT) LOCATION: US</li> <li>◦ Joint Stock (Owner: JT) LOCATION: US</li> <li>◦ Rollover IRA</li> </ul>
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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:** David Orenticher , 04/2/2016