



Filing ID #10002370

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Marisa A. Defranco
Status: Congressional Candidate
State/District: MA06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2014
Filing Date: 09/11/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|-----------------------------------|-------|----------------------|----------------|-------------------------------|-----------------------|
| American Europacific Growth | JT | \$1,001 - \$15,000 | Dividends | None | \$1 - \$200 |
| American Investment Co of America | JT | \$1,001 - \$15,000 | Dividends | None | \$1 - \$200 |
| American Small Cap World | JT | \$1,001 - \$15,000 | Dividends | None | \$201 - \$1,000 |
| BMO Growth Balanced | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| BMO Stable Principal | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Citizens Bank Money Market | JT | \$50,001 - \$100,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Columbia International Bond | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Davis NY Venture Y | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Fidelity Balanced Mutual Fund | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Fidelity Cash Reserves | | \$100,001 - | Tax-Deferred | None | None |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| | | \$250,000 | | | |
| Fidelity Growth, Balanced, Diversified | SP | \$50,001 - \$100,000 | Tax-Deferred | None | None |
| Franklin High Income | JT | \$1,001 - \$15,000 | Dividends | None | \$201 - \$1,000 |
| IShares 1-3 year Treasury Bond ETF | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IShares MSCI EAFE ETF | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IShares Russell 2000 ETF | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IShares US Bond Market | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| Life Path 2030 Fund | SP | \$50,001 - \$100,000 | Tax-Deferred | None | None |
| Oppenheimer International Bond | JT | \$1,001 - \$15,000 | Dividends | None | \$1 - \$200 |
| Putnam Investors | JT | \$1,001 - \$15,000 | Dividends | None | \$1 - \$200 |
| Rental home, Erie, PA | JT | \$100,001 - \$250,000 | Rent | \$5,001 - \$15,000 | \$5,001 - \$15,000 |
| LOCATION: Erie, PA, US | | | | | |
| SPDR S&P 500 ETF Trust | | \$50,001 - \$100,000 | Tax-Deferred | None | None |
| Templeton Developing Markets | JT | \$1,001 - \$15,000 | Dividends | None | \$201 - \$1,000 |
| Vanguard Target Retirement 2035 | SP | \$1 - \$1,000 | Tax-Deferred | None | None |

SCHEDULE C: EARNED INCOME

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|-------------------------------|---------------|-------------------------------|-----------------------|
| Law Office of Marisa DeFranco | Self-employed | \$75,000 | \$75,000 |
| Philips Electronics | Spouse Salary | N/A | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|------------------------|----------------|---|---------------------|
| SP | Nelnet | September 2004 | Student Loans | \$15,001 - \$50,000 |
| JT | Northwest Savings Bank | March 2001 | Mortgage on 2729 W. 31st Street, Erie, PA | \$15,001 - \$50,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|-----------------|-------------------------------|
| Sole Proprietor | Law Office of Marisa DeFranco |

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 |
|---------------------------------------|-----------------------------|
| Confidential Clients (Boston, MA, US) | Attorney |

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

COMMENTS

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: Marisa A. Defranco , 09/11/2014