



Filing ID #10031094

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Kerry Bentivolio  
**Status:** Congressional Candidate  
**State/District:** MI11

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 11/30/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds Cap Inc Builder A ⇒ IRA [OT]  DESCRIPTION: US Stocks-Pershing LLC is custodian of this account	SP	\$100,001 - \$250,000	Tax-Deferred		
American Funds Conservative Growth and Income Fund Class A ⇒ IRA [OT]  DESCRIPTION: Bonds-Pershing LLC is custodian of this account	SP	\$100,001 - \$250,000	Tax-Deferred		
Brokerage Money Market [IH]  DESCRIPTION: Pershing LLC is custodian of this account	SP	\$15,001 - \$50,000	None		
Capital Income Builder ⇒ Capital Group/American Funds [OT]  DESCRIPTION: Roth IRA-one of four funds-(CAIBX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Capital Income Builder-A ⇒ Capital Group/American Funds [OT]  DESCRIPTION: 1st of 4 funds in Candidate's Roth IRA CAIBX-US Stocks		\$1,001 - \$15,000	Tax-Deferred		
Community Choice Credit Union [BA]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Community Choice Credit Union [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Euro Pacific Growth Fund ⇒ Capital Group/American Funds [OT] DESCRIPTION: Roth IRA- one of four funds-(AEPGX)	SP	\$1,001 - \$15,000	Tax-Deferred		
EuroPacific Growth Fund-A ⇒ Capital Group/American Funds [OT] DESCRIPTION: 2nd of 4 funds in Candidate's Roth IRA AEPGX		\$1,001 - \$15,000	Tax-Deferred		
Fundamental Investors ⇒ Capital Group/American Funds [OT] DESCRIPTION: Roth IRA-one of four funds- (ANCFX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Fundamental Investors-A ⇒ Capital Group/American Funds [OT] DESCRIPTION: 3rd of 4 funds in Candidate's Roth IRA ANCFX		\$1,001 - \$15,000	Tax-Deferred		
General Electric Company (GE) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Huron Valley State Bank accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Michigan Educational Savings Plan ⇒ MESP [OT] DESCRIPTION: Moderate Age-Based 13-14 yrs	SP	\$1,001 - \$15,000	Tax-Deferred		
Michigan Educational Savings Plan ⇒ MESP [OT] DESCRIPTION: Moderate Age-based 11-12 yrs	SP	\$1,001 - \$15,000	Tax-Deferred		
Michigan Educational Savings Plan ⇒ MESP [OT] DESCRIPTION: Moderate Age-based 5-8yrs	SP	\$1,001 - \$15,000	Tax-Deferred		
Michigan Educational Savings Plan ⇒ MESP [OT] DESCRIPTION: Moderate Age-base 5-8 yrs	SP	\$1,001 - \$15,000	Tax-Deferred		
New World Fund ⇒ Capital Group/American Funds [OT] DESCRIPTION: Roth IRA-one of four funds-(NEWFX)	SP	\$1,001 - \$15,000	Tax-Deferred		
New World Fund-A ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital Group/American Funds [OT]					
DESCRIPTION: 4th of 4 funds in Candidate's Roth IRA NEWFX					
The Income Fund of America-A ⇒ IRA [OT]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: US Stocks-Pershing LLC is custodian of this account.					
Transamerica Premier Life Insurance Company [WU]		\$1,001 - \$15,000	None		

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Ascension	Spouse salary	N/A	N/A
MI Military Affairs Retirement System	Retirement distribution	\$550.00	\$600.00
Fowlerville Community Schools	Substitute Teacher	N/A	\$2,657.00
Michigan Public School Employee Retirement	Retirement payment	N/A	\$23,137.00

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Honorable Kerry Bentivolio LLC
Member	Centurion International Services LLC

### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

### SCHEDULE A ASSET CLASS DETAILS

- American Funds Cap Inc Builder A (Owner: SP)  
DESCRIPTION: US Stocks
- American Funds Conservative Growth and Income Fund Class A (Owner: SP)  
DESCRIPTION: Bonds
- Capital Income Builder (Owner: SP)  
DESCRIPTION: one of 4 funds in Roth IRA from Capital Group/American Funds
- Capital Income Builder-A  
DESCRIPTION: Capital Group/ American Funds Roth IRA CAIBX Stocks
- Euro Pacific Growth Fund (Owner: SP)  
DESCRIPTION: one of four funds in Capital Group/American Funds Roth IRA
- EuroPacific Growth Fund-A  
DESCRIPTION: Capital Group/American funds Roth IRA AEPGX
- Fundamental Investors (Owner: SP)  
DESCRIPTION: one of four funds held in Capital Group/American Funds Roth IRA
- Fundamental Investors-A  
DESCRIPTION: Capital Group/American Funds Roth IRA ANCFX
- Michigan Educational Savings Plan (Owner: SP)  
LOCATION: MI  
DESCRIPTION: Moderate Age Based Option 13-14 yrs
- Michigan Educational Savings Plan (Owner: SP)  
LOCATION: MI  
DESCRIPTION: Moderate Age Based Option 11-12 yrs
- Michigan Educational Savings Plan (Owner: SP)  
LOCATION: MI  
DESCRIPTION: Moderate Age Based 5-8 yrs
- Michigan Educational Savings Plan (Owner: SP)  
LOCATION: MI  
DESCRIPTION: Moderate Age Based 5-8 yrs
- New World Fund (Owner: SP)  
DESCRIPTION: one of four funds held in Capital Group/American Funds Roth IRA
- New World Fund-A  
DESCRIPTION: Capital Group/American Funds Roth IRA NEWF-X
- The Income Fund of America-A (Owner: SP)  
DESCRIPTION: US Stocks

## 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:** Hon. Kerry Bentivolio , 11/30/2019