



Filing ID #10026264

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Karen Christine Handel  
**Status:** Congressional Candidate  
**State/District:** GA06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 05/2/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baird ⇒ American Funds Capital Income Builder Class F-1 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Baird ⇒ American Funds Capital World Growth and Income Fund Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		
Baird ⇒ American Funds The Growth Fund of America Class A [MF]		\$50,001 - \$100,000	Tax-Deferred		
Baird ⇒ American Funds The Growth Fund of America Class F-1 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Baird ⇒ American Funds Washington Mutual Investors Fund Class A [MF]		\$50,001 - \$100,000	Tax-Deferred		
Baird ⇒ American Funds Washington Mutual Investors Fund Class F-1A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baird ⇒ Dearborn Partners Rising Dividend Fund Class C Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
Baird ⇒ Dearborn Partners Rising Dividend Fund Class C Shares [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Baird ⇒ First Eagle Global Fund Class C [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Baird ⇒ First Eagle U.S. Value Fund Class C [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Baird ⇒ Franklin Mutual Shares Fund Class C [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Baird ⇒ Thornburg International Value Fund Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
GaBreeze ⇒ LrgCapGrwStk [MF]		\$15,001 - \$50,000	Tax-Deferred		
GaBreeze ⇒ MidCapCoreStk [MF]		\$15,001 - \$50,000	Tax-Deferred		
GaBreeze ⇒ SmCapCoreStk [MF]		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual ⇒ High Yield Bond (MSA/Federated Inv.)-B [MF]		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Mutual ⇒ Index 500 Stock (MSA)-B [MF]		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Mutual ⇒ Small Cap Growth Stock (MSA/Wellington)-B [MF]		\$1,001 - \$15,000	Tax-Deferred		
TextGov LLC, 100% Interest [OL]	SP	\$15,001 - \$50,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Roswell, GA, US					
DESCRIPTION: TextGov provides messaging services to various state, county and local courts					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TIAA Fulton County Deferred Compensation Plan ⇒ Gallard Retirement Income 60 [MF]		\$1,001 - \$15,000	Tax-Deferred		
TIAA Fulton County Deferred Compensation Plan ⇒ Metrop West Tot Ret Bd M [MF]		\$1,001 - \$15,000	Tax-Deferred		
TIAA Fulton County Deferred Compensation Plan ⇒ T Rowe Price Gr Stk Adv [MF]		\$1,001 - \$15,000	Tax-Deferred		

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Marriott Chase Credit Card	March 2018	credit card	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Principal COMMENTS: Entity dissolved during 2017	Handel Strategy Group
Principal COMMENTS: position in 2019 only	Cogent Strategies LLC
Member of Congress COMMENTS: 2018	U.S. House of Representatives
Board Member COMMENTS: Resigned, 2017	SafeHouse Ministries

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2003	Fulton County, GA	Continued participation in deferred compensation plan

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Baird (Owner: SP)  
DESCRIPTION: Steve's Baird IRA
- Baird  
DESCRIPTION: Karen's Baird IRA
- GaBreeze  
DESCRIPTION: Georgia Breeze
- Northwestern Mutual
- TIAA Fulton County Deferred Compensation 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:** Hon. Karen Christine Handel , 05/2/2019