



Filing ID #10001714

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Richard R. Tisei
Status: Congressional Candidate
State/District: MA06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2014
Filing Date: 05/10/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
26 Main Street LLC	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$100,001 - \$1,000,000
LOCATION: Lynnfield, MA, US DESCRIPTION: Units A,B,C of Commercial Office Building Located in Lynnfield MA					
701 Main Street Trust	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Wakefield, MA, US DESCRIPTION: Rental Property Located in Wakefield MA					
American Century Cap Portfolio Mid		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Bank of America Corporation (BAC)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Corning Incorporated (GLW)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Corning Incorporated (GLW)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Eastern Bank	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Savings Account					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Eastern Bank		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Homeward Bound Properties Inc, 100% Interest	JT	\$500,001 - \$1,000,000	None		
LOCATION: Lynnfield, MA, US DESCRIPTION: A Real Estate Brokerage Located in Lynnfield MA					
MA 457 Deferred Compensation Smart Plan ⇒ Large Company Blend Stock Fund		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	Not Applicable
MA 457 Deferred Compensation Smart Plan ⇒ Large Company Growth Stock Fund		\$50,001 - \$100,000	Tax-Deferred	Not Applicable	Not Applicable
MA 457 Deferred Compensation Smart Plan ⇒ Small Company Stock Fund		\$50,001 - \$100,000	Tax-Deferred	Not Applicable	Not Applicable
MA 457 Deferred Compensation Smart Plan ⇒ Smart Path 2025 Retirement Fund		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Amer Funds Gro-Inc		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Amer Funds Gro-Inc	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Baillie Intn'l Stock	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Baillie Intn'l Stock		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Barclys Capi A Bnd Index		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Barclys Capi A Bnd Index	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Black Rock Bd Inc Prt	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Met Life Variable Life Insurance ⇒ Black Rock Bd Inc Prt		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Black Rock Leg Lg Cap Grow		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Black Rock Leg Lg Cap Grow	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ BR LC Value	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ BR LC Value		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Davis Venture Value		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Davis Venture Value	SP	\$15,001 - \$50,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ MetArt Mid Cap Value		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ MetArt Mid Cap Value	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Russell 2000 Index	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Met Life Variable Life Insurance ⇒ Russell 2000 Index		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Northrup Associates Inc, 100% Interest	JT	\$1 - \$1,000	None		
LOCATION: Wakefield, MA, US DESCRIPTION: A Property Management Company Located in Wakefield MA					
Northrup Realty Trust	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Edgartown, MA, US DESCRIPTION: Rental Property Located In Edgartown MA					
Oakmark Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Polaris Platinum II Variable Annuity	SP	\$100,001 - \$250,000	Tax-Deferred	None	None
Vanguard IRA ⇒ Vangaurd Value	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Vanguard IRA ⇒ Vanguard Bd Index FD Inc Short Term	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Vanguard IRA ⇒ Vanguard Growth ETF	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Vanguard IRA ⇒ Vanguard International Equity Index	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Vanguard IRA ⇒ Vanguard Scotsdale FOS Management	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Vanguard IRA ⇒ Vanguard Tax-Managed Intl Fund	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	Not Applicable
Wakefield Cooperative Bank DESCRIPTION: Savings Account		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Wakefield Cooperative Bank DESCRIPTION: Savings Account	SP	\$15,001 - \$50,000	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
Homeward Bound Properties Inc	Salary	\$8,000	\$42,000
Homeward Bound Properties Inc	Spouse	N/A	N/A
MA 457 Deferred Compensation Smart Plan	Distribution	N/A	\$20,000
Nichols College	Honorarium For Speech	N/A	\$500
L. Davinci LLC	Consulting	N/A	\$2,000

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Salem 5 Bank, Salem MA	Dec 2007	Business Line of Credit	\$250,001 - \$500,000
JT	BOA Visa Wilmington DE	Revolving	Business credit card	\$15,001 - \$50,000
SP	Discover Card, Coral Stream IL	January 2013	personal loan	\$15,001 - \$50,000
JT	Ocwen	Feb 2013	Mortgage on Rental Property Located in Edgartown MA	\$250,001 - \$500,000
JT	Wakefield Cooperative Bank, Wakefield MA	Feb 2007	Mortgage on Rental Property Located in Wakefield MA	\$100,001 - \$250,000
JT	Eastern Bank, Middleborough MA	May 2005	Mortgage on Unit A&C, Commercial Office Building located in Lynnfield MA	\$500,001 - \$1,000,000
JT	Eastern Bank, Middleborough MA	May 2005	2nd Mortgage on Units A&C, Commercial Property located in Lynnfield MA	\$50,001 - \$100,000
JT	Eastern Bank, Middleborough MA	Nov 2008	Mortgage on Unit B, Commercial Office Building located in Lynnfield MA	\$250,001 - \$500,000
JT	RGA Ventures, Lynnfield MA	Nov 2008	2nd Mortgage on Unit B, Commercial Property located in Lynnfield MA	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Manager	Northrup Partners LLC
Trustee	Stoneham Theater
Corporator	Hallmark Health
Corporator	The Savings Bank
President	Homeward Bound Properties Inc
President	Northrup Associates Inc
Manager	26 Main Street LLC
Trustee	701 Main Street Trust
Trustee	Northrup Realty Trust

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1990	Richard R Tisei & Commonwealth of Massachusetts	Pension that will provide a monthly benefit of an undetermined amount upon retirement

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

Source (Name and Address)	Brief Description of Duties
Remax Main Street Associates (Haverhill, MA, US)	Real Estate Services
Coldwell Banker Residential Brokerage (Andover, MA, US)	Real Estate Services
Coldwell Banker Residential Brokerage (Lynnfield, MA, US)	Real Estate Services
C21 Spindler & O'Neil (North Reading, MA, US)	Real Estate Services

SCHEDULE A ASSET CLASS DETAILS

- MA 457 Deferred Compensation Smart Plan
- Met Life Variable Life Insurance (Owner: SP)
- Met Life Variable Life Insurance
- Vanguard IRA (Owner: SP)

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: Richard R. Tisei , 05/10/2014