



Filing ID #10028868

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Kathleen Anderson
Status: Congressional Candidate
State/District: UT04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 08/15/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Airlines, Inc 401(k) Plan for Pilots ⇒ Fidelity Emerging Markets Stk [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
American Airlines, Inc 401(k) Plan for Pilots ⇒ Fidelity Inflation Protection Bond [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
American Airlines, Inc 401(k) Plan for Pilots ⇒ Fidelity International Stock [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
American Airlines, Inc 401(k) Plan for Pilots ⇒ Fidelity US Lg Cap Grth Stock [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
American Airlines, Inc 401(k) Plan for Pilots ⇒ Fidelity US LG CAP Val Stock [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
American Airlines, Inc 401(k) Plan for Pilots ⇒ Fidelity US Mid Cap Stk Idx [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
American Airlines, Inc 401(k) Plan for Pilots ⇒ Fidelity US Small Mid Cap Stk [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
CDGRX-Copeland Risk Managed Dividend GR		None	Capital Gains	\$15,001 - \$50,000	\$2,501 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
A [MF] DESCRIPTION: Copeland Risk Managed Dividend Gr A					\$5,000
CDGRX-Copeland Risk Managed Dividend GR A [MF] DESCRIPTION: Copeland Risk Managed Dividend GR A		None	Capital Gains	None	\$5,001 - \$15,000
CDGRX-Copeland Risk Managed Dividend GR A [MF] DESCRIPTION: Copeland Risk Managed Dividend GR A		None	Dividends	None	\$1 - \$200
FRDAX-Franklin Rising Dividends Advisor [MF] DESCRIPTION: Franklin Rising Dividends Advisor		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
FRDAX-Franklin Rising Dividends Advisor [MF] DESCRIPTION: Franklin Rising Dividends Advisor		\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500
Frk Mut European A [MF] DESCRIPTION: Frk Mut European A		None	Dividends	None	\$201 - \$1,000
Frk Mut European A [MF] DESCRIPTION: Frk Mut European A		None	Capital Gains	None	None
HJPNX-Hennessy Funds Japan Fund Investor [MF] DESCRIPTION: Hennessy Funds Japan Fund Investor		None	Dividends	None	\$1 - \$200
HJPNX-Hennessy Funds Japan Fund Investor [MF] DESCRIPTION: Hennessy Funds Japan Fund Investor		None	Capital Gains	\$5,001 - \$15,000	None
INFIX - Adv Research MLP & Ene Inc [MF] DESCRIPTION: Adv Research MLP & Ene Inc		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
MetLife Insurance Policy [WU]		\$15,001 - \$50,000	Tax-Deferred		
Nationwide Life Insurance Policy [WU]		\$50,001 - \$100,000	Tax-Deferred		
SHSAX-Blackrock Health Sciences OptyA [MF]		None	Capital Gains	\$5,001 - \$15,000	\$1,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Blackrock Health Sciences Opty A					\$2,500
SHSAX-Blackrock Health Sciences OptyA [MF]		None	Dividends	None	\$1 - \$200
DESCRIPTION: Blackrock FDS Health Sciences Opty A					
TD Ameritrade Cash Account [BA]		\$1,001 - \$15,000	Interest	None	\$1 - \$200
TD Ameritrade Rollover IRA ⇒ AEGFX-American Funds EuroPacific Growth Fund [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
TD Ameritrade Rollover IRA ⇒ FRDAX-Franklin Rising Dividends Advisor [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
DESCRIPTION: FRDAX - Franklin Rising Dividends Advisor					
TD Ameritrade Rollover IRA ⇒ GASFX-Hennessy Gas Utility Fund [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
DESCRIPTION: GASFX-Hennessy Gas Utility Fund					
TD Ameritrade Rollover IRA ⇒ HJPNX-Hennessy Funds Japan Fund Investor [MF]		\$1,001 - \$15,000	Tax-Deferred		
TD Ameritrade Rollover IRA ⇒ INFIX - Adv Research MLP & Ene Inc [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	None
DESCRIPTION: INFIX - Adv Research MLP & Ene Inc					
TD Ameritrade Rollover IRA ⇒ IRGWX-Voya Global Real Estate Fund Class W [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
TD Ameritrade Rollover IRA ⇒ MDGRX-Blackrock Natural Resources Trust Investor [MF]		\$1,001 - \$15,000	Tax-Deferred		
TD Ameritrade Rollover IRA ⇒ TD Ameritrade 606 [IH]		\$1,001 - \$15,000	Interest	\$1 - \$200	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
American Airlines Inc	spouse salary	\$147,603.00	\$286,586.00

SCHEDULE D: LIABILITIES

None disclosed.

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

- American Airlines, Inc 401(k) Plan for Pilots (Owner: SP)
- TD Ameritrade Rollover IRA

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: Kathleen Anderson , 08/15/2019