



Filing ID #10002058

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Martha E. McSally  
**Status:** Congressional Candidate  
**State/District:** AZ02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2014  
**Filing Date:** 05/14/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
18 acres of land  LOCATION: Elgin, AZ, US		\$100,001 - \$250,000	None		
Intermediate Term Bond Fund		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Prudential Variable Annuity ⇒ Advanced Series Trust--Advanced Strategies Portfolio		\$50,001 - \$100,000	None		
Prudential Variable Annuity ⇒ Advanced Series Trust--FI Pyramis Asset Allocation Portfolio		\$50,001 - \$100,000	None		
Prudential Variable Annuity ⇒ Advanced Series Trust--J.P. Morgan Global Thematic		\$50,001 - \$100,000	None		
Prudential Variable Annuity ⇒ Advanced Series Trust--Prudential Growth Allocation		\$50,001 - \$100,000	None		
Rental Property		\$100,001 -	Rent	None	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
		\$250,000			\$1,000
LOCATION: Pima, AZ, US					
USAA 529 Nephew 1 ⇒ USAA 529 Nephew 1		\$1,001 - \$15,000	None		
USAA 529 Nephew 2 ⇒ USAA 529 Nephew 2		\$1,001 - \$15,000	None		
USAA 529 Nephew 3 ⇒ USAA 529 Nephew 3		\$1,001 - \$15,000	None		
USAA 529 Niece 1 ⇒ USAA 529 Niece 1		\$1,001 - \$15,000	None		
USAA 529 Niece 2 ⇒ USAA 529 Niece 2		\$1,001 - \$15,000	None		
USAA 529 Niece 3 ⇒ USAA 529 Niece 3		\$1,001 - \$15,000	None		
USAA 529 Self ⇒ USAA 529 Self		\$1,001 - \$15,000	None		
USAA Checking Account		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
USAA Managed Portfolio Roth IRA ⇒ ABEYX AMERICAN BEACON INTL EQUITY FUND CLASS Y (NTF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ DDVIX DELAWARE VALUE CLASS INSTL (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ EMBIX LAZARD EMERGING MARKETS EQUITY BLEND PORTFOLIO FUND CLASS INST (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ HLMIX HARDING LOEVNER INTL EQUITY PORTFOLIO FUND CLASS INST (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ HNVIX HEARTLAND VALUE PLUS INST (TF)		\$1,001 - \$15,000	None		

<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>
USAA Managed Portfolio Roth IRA ⇒ HWSIX HOTCHKIS & WILEY SMALL CAP VALUE CL I (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ IIBWX VOYA INTERMEDIATE BOND FUND CLASS W (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ LISIX LAZARD INTL STRATEGIC EQUITY PORTFOLIO FUND CLASS INST (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ LKSMX LKCM SMALL-MID CAP EQ FD-INS (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ MFEIX MFS GROWTH FUND CLASS INST-FEE BASED ONLY (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ PTTRX PIMCO TOTAL RETURN INST (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ SEMNX SCHRODER EMERGING MARKET EQUITY INVESTOR SHS (TF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ SGOIX FIRST EAGLE OVERSEAS INSTL (TF)		\$1 - \$1,000	None		
USAA Managed Portfolio Roth IRA ⇒ TGEIX TCW EMERGING MARKETS INCOME I (TF)		\$1 - \$1,000	None		
USAA Managed Portfolio Roth IRA ⇒ UIHIX USAA HIGH INCOME FUND INSTITUTIONAL SHS (NTF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ UIINX USAA INCOME FUND INSTITUTIONAL SHS (NTF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ UIPMX USAA PRECIOUS METALS & MINERALS FD INSTITUTIONAL SHS (NTF)		\$1 - \$1,000	None		
USAA Managed Portfolio Roth IRA ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UIRRX USAA REAL RETURN FUND INSTITUTIONAL SHS (NTF)					
USAA Managed Portfolio Roth IRA ⇒ UISBX USAA SHORT-TERM BOND FUND INSTITUTIONAL SHS (NTF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ UMAFX USAA MANAGED ALLOCATION (NTF)		\$1,001 - \$15,000	None		
USAA Managed Portfolio Roth IRA ⇒ USAXX USAA Money Market Fund		\$1,001 - \$15,000	None		
USAA Money Market Fund		\$1 - \$1,000	Dividends	None	None
USAA Savings Accounts		\$1 - \$1,000	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
Microbusiness Advancement Center of S. AZ	Speech		\$500
Bradford Swissport Logistics	Co-Leader of Leadership Developement Seminar		\$3,091
Tucson Alumnae Panhellenic Association	Speech	\$	\$500
Discount Tire	Speech	\$	\$3,000
Premiere Speakers Bureau	Speeches	\$6,000	\$18,900
American Emergency Vehicles	Speech	\$	\$3,000
George C. Marshall Center for European Studies	Speech	\$	\$1,000
Niswonger Foundation	Speech	\$	\$7,000
Harris County Sheriff's Office	Speech and Co-leader of Leadership Development Seminar		\$12,000
Bradford Airport Logistics	Co-leader of Leadership Development Seminar	\$	\$3,500

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Workforce Outsource Services, Inc	Speech	\$4,000	N/A
LRA Enterprises, Inc.	Speech	\$8,000	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo Mortgage	March 2013	Home Mortgage Refinance VA Loan	\$100,001 - \$250,000
	Bank of America Home Loans	October 2002	Home Mortgage (paid off with VA refinancing March 2013)	\$15,001 - \$50,000
	USAA	April 2006	Home Equity Line of Credit (paid off with VA refinance March 2013)	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Commissioner	Pima County/Tucson Women's Commission
Sole Proprietor	Martha McSally 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

<ul style="list-style-type: none"><li>Prudential Variable Annuity DESCRIPTION: converted from military and civilian thrift savings account</li><li>USAA 529 Nephew 1 LOCATION: NV</li><li>USAA 529 Nephew 2 LOCATION: NV</li><li>USAA 529 Nephew 3 LOCATION: NV</li><li>USAA 529 Niece 1 LOCATION: NV</li></ul>
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- USAA 529 Niece 2  
LOCATION: NV
- USAA 529 Niece 3  
LOCATION: NV
- USAA 529 Self  
LOCATION: NV
- USAA Managed Portfolio Roth 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

## 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:** Martha E. McSally , 05/14/2014