



Filing ID #10018412

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Jose Javier Rodriguez  
**Status:** Congressional Candidate  
**State/District:** FL27

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 08/6/2017  
**Period Covered:** 01/01/2016– 07/6/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American States Water Company (AWR)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
American Water Works Company, Inc. (AWK)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Aqua America, Inc. (WTR)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capitol One savings		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Core deposit sweep		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Fidelity Fcash		\$1,001 - \$15,000	None		
FIDELITY VALUE DISCOVERY		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Mutual of America 2045 Retirement Fund		\$1,001 - \$15,000	Capital Gains,	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
			Dividends		
Mutual of America Aggressive Allocation Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Mutual of America All America Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Mutual of America Mid Cap Value Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Mutual of America Mid-Cap Equity Index Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Mutual of America Moderate Allocation Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Mutual of America Small Cap Growth Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Mutual of America Small Cap Value Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
NH PORTFOLIO 2033		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
LOCATION: NH					
PRUDENTIAL US REAL ESTATE CL A		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
TIAA-CREF Lifecycle 2040 Fund Retirement Class		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Twitter, Inc. (TWTR)		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
VANGUARD INDEX FDS MID-CAP VALUE INDEX		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Volkswagen A G Ord American Depositary Shares (VLKAY)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
VWENX Vanguard Wellington Adm		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
XLVSELECT SECTOR SPDR TR HEALTH CARE FORMERLY CONSUMER SVCS TO		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Florida Legislature	employment	\$29,597.00	\$44,395.50
Jose Javier Rodriguez, P.A.	self employment	N/A	\$43,686.46
The Nature Conservancy	spouse salary	\$92,000.00	\$45,999.00
Everglades Foundation	spouse salary	N/A	\$102,573.00

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	U.S. Department of Education's Direct Loan Program	May 2010	student loan	\$50,001 - \$100,000
	Branch Banking and Trust (BB&T)	April 2017	vehicle loan	\$15,001 - \$50,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
President	Jose Javier Rodriguez, P.A.

**SCHEDULE F: AGREEMENTS**

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Kelley Uustal PLC (Ft. Lauderdale, FL, US)	legal services

**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:** Jose Javier Rodriguez , 08/6/2017