



Filing ID #10019466

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Mr. Weldon Frederick Wooden
Status: Congressional Candidate
State/District: MI03

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2017
Filing Date: 11/27/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds 403b ⇒ American Balanced Fund DESCRIPTION: 403b holding		\$1 - \$1,000	Tax-Deferred		
American Funds 403b ⇒ American Funds 2020 Retirement Fund DESCRIPTION: 403b holding		\$100,001 - \$250,000	Tax-Deferred		
American Funds 403b ⇒ Capital World Growth and Income Fund DESCRIPTION: 403b holdin		\$1 - \$1,000	Tax-Deferred		
American Funds 403b ⇒ Growth Fund of America DESCRIPTION: 403b holding		\$1 - \$1,000	Tax-Deferred		
American Water Works Company, Inc. (AWK)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brookfield Infrastructure Partners LP Limited Partnership Units (BIP)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
checking accounts		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Children's Trust ⇒ National Life		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
CSX Corporation (CSX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Exelon Corporation (EXC)	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: dividends from inherited funds					
Exelon Corporation (EXC)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Ford Motor Company (F)		\$1 - \$1,000	None		
FTI Consulting, Inc. (FCN)		\$1 - \$1,000	None		
Northwest Insurance	SP	\$100,001 - \$250,000	None		
Northwest Insurance		\$50,001 - \$100,000	None		
Personal Residence w/ Apartment	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Grand Rapids, MI, US DESCRIPTION: Portion of personal residence used as rental apartment.					
Prudential Retirement Account ⇒ Lord Abbett Mid Cap Stock A	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 40 for spouse					
Prudential Retirement Account ⇒ Medley Equity Account	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: 403b for spouse					
Prudential Retirement Account ⇒ Medley Money Market	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 403b for spouse					
Roth IRA ⇒ Vanguard Total Bond Market Admiral Shares		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Roth IRA					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ Vanguard Total Fund Bond Market Admiral Shares	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Roth IRA for spouse					
savings account		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Tesla, Inc. (TSLA)		\$1,001 - \$15,000	None		
TIAA Creff ⇒ Social Choice Bond Fund		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: 403b for UUA clergy					

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Fountain Street Church	salary for services as clergyman	\$95,000.00	\$90,000.00
COMMENTS: salary and housing earned for 2016 and 2017 respectively			
Grand Rapids Public Schools	spouse's salary	\$13,100.00	\$13,000.00
COMMENTS: services provided as a tutor coordinator			

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Fifth Third Bank	February 2005	mortgage on personal home	\$100,001 - \$250,000
COMMENTS: Portion of home rented as income, thus reported here.				

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Grand Rapids Urban League
COMMENTS: uncompensated position with local non-profit	

Position	Name of Organization
Director	Opera Grand Rapids
COMMENTS: uncompensated position for local non-profit	

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 Funds 403b
DESCRIPTION: 403b for Fountain Street Church
- Children's Trust (25% Interest)
DESCRIPTION: Created on death of parents, holding IRAs for distribution to four children.
COMMENTS: assets not managed by beneficiaries
- Prudential Retirement Account (Owner: SP)
DESCRIPTION: Retirement account for Grace Church School
- Roth IRA
DESCRIPTION: Personal IRA for WFW
- Roth IRA (Owner: SP)
DESCRIPTION: Personal IRA for spouse
- TIAA Creff
DESCRIPTION: Retirement for UUA clergy

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: Mr. Weldon Frederick Wooden , 11/27/2017