



Filing ID #10032276

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Kelly Mitchell
Status: Congressional Candidate
State/District: IN05

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 12/23/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CollegeChoice 529 [5P] LOCATION: IN		\$1 - \$1,000	None		
Hoosier S.T.A.R.T. [IH]		\$15,001 - \$50,000	Tax-Deferred		
INPRS [DB]		\$15,001 - \$50,000	None		
Lincoln Financial Group [IH]		\$1,001 - \$15,000	Tax-Deferred		
Northwest Mutual - Life Insurance [OT] DESCRIPTION: Life insurance policy		\$1,001 - \$15,000	None		
Northwestern Mutual [IH]		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual [IH]		\$15,001 - \$50,000	Tax-Deferred		
Old National [BA]		\$1,001 - \$15,000	None		
Old National - HSA [OT]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Health Savings Account					
Vanguard [IH]		\$15,001 - \$50,000	Tax-Deferred		
Voya Financial [IH]		\$1,001 - \$15,000	Tax-Deferred		

* 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
State of Indiana	Salary	\$97,691.69	\$92,447.98
Common Ground Christian Church	Spouse Consulting	\$5,100.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Old National	August 2004	Mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Indiana Treasurer of State	State of Indiana
Trustee	Indiana Public Retirement System
Trustee	State Police Pension Trust
Chair	Indiana Statewide 911 Board
Chair	Indiana Bond Bank
Chair	Indiana Education Savings Authority
Chair	INvestABLE Authority
Vice Chair	Indiana Finance Authority
Vice-Chair	Indiana Housing and Community Development Authority
Secretary/Investment Manager	Public Deposit Insurance Fund

Position	Name of Organization
National Chair - Elect	State Financial Officers Foundation
National Senior Vice President Elect	National Association of State Treasurers
Member	Indiana State Board of Finance
Member	Indiana Deferred Compensation Committee
Member	Indiana Grain Indemnity Corporation
Member	Underground Storage Tank Financial Assurance Board
Member	Next Level Indiana Trust Fund
Member	Enterprise Resource Planning Governance Committee
Member	Indiana Community Business Credit Corporation

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1997	Myself and the State of Indiana	Pension Plan

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

None disclosed.

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: Kelly Mitchell , 12/23/2019