

UNITED STATES HOUSE OF REPRESENTATIVES

FORM B

FINANCIAL DISCLOSURE STATEMENT

For New Members, Candidates, and New Employees

Name: John R. Curtis

Daytime Telephone: 1

FILER STATUS



New Member of or Candidate for U.S. House of Representatives

State: Utah District: 3

Candidates ~ Date of Election: August 15, 2017



Check if Amendment



New Officer or Employee Employing Office:

Staff Filer Type (if Applicable): Shared ☐ Principal Assistant ☐

Period Covered: January 1, 2016 to June 30, 2017

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

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LEGISLATIVE RESOURCE CENTER

18 JAN 19 PM 4:18

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES
(Office Use Only)

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>or</u> b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?		Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?		Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?		Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	J. Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"
THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS

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 that benefits you, your spouse, or dependent child?

Yes ☐ No ☒

EXEMPTION - Have you excluded from this report any other assets, "unearned" income, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.

Yes ☐ No ☒

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SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: John R. Curtis

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BLOCK A		BLOCK B													BLOCK C					BLOCK D																											
Assets and/or Income Sources		Value of Asset													Type of Income					Amount of Income																											
SP	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	DIVIDENDS	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	OTHER	Current Year												Preceding Year															
SI		None	\$1,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$5,000,000	\$5,000,001-\$25,000,000	\$25,000,001-\$50,000,000	Spouse/DC Asset over \$1,000,000*								I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII				
	John Curtis IRA Rollover - assets below																																														
	Fidelity Income Fund Advisor																																														
	Johnston Core Plus Bond Fund (CI)																																														
	Fidelity Global Fund																																														
	TCW Total Return Fund																																														
	PIMCO Income Fund Class D																																														
	Fidelity Advisor Funding Plus High Income Bond Fund Class H																																														
	BlackRock Strategic Income Opportunities Portfolio (CI Institutional)																																														
	Lord Abbett Short Duration Income Fund Class F																																														
	Bank Deposit Sweep Program																																														
	John Curtis IRA Rollover (JCR) NPS - assets below																																														
	Fidelity Equity Income Fund Class Y																																														
	Fidelity Core Equity Fund - Investor Shares																																														
	American Funds Capital Income Builder Class F-2																																														

Use additional sheets if more space is required.

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Use additional sheets if more space is required.

SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: _____

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset											BLOCK C Type of Income						BLOCK D Amount of Income																			
SP	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	None	DIVIDENDS	INTEREST	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Fees Income)	Current Year							Preceding Year											
																				I	II	III	IV	V	VI	VII	VIII	IX	X	XI	Preceding Year	Preceding Year	Preceding Year	Preceding Year	Preceding Year	Preceding Year	Preceding Year	Preceding Year
	Transamerica Global Smaller Companies Fund Class A																																					
	Bank Deposit Sweep Program																																					
	John Quidley Family Rev Trust (JQT) LIA																																					
	08/10/1980 - assets below																																					
	American Funds Capital Income Builder Class F-2																																					
	Putnam Equity Income Fund Class Y																																					
	Investment Co of America Equity Fund - Investor Shares																																					
	Domini Social Equity & Income Fund Class Y																																					
	Investment Co of America Equity Fund - Investor Shares																																					
	First Eagle Global Fund Class A																																					
	Vanguard Dividend Growth Fund Investor Shares																																					
	Fidelity Govt Money Market Capital Reserve Class J																																					
	John Quidley Family Rev Trust (JQT) LIA																																					
	08/10/1980 - assets below																																					
	French Income Fund Advisor Class																																					
	JPMorgan Core Plus Bond Fund Class I																																					
	TOW Total Return Bond Fund Class N																																					

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SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

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BLOCK A Assets and/or Income Sources			BLOCK B Value of Asset													BLOCK C Type of Income								BLOCK D Amount of Income																								
SP, DC, JT	ASSET NAME	EB	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	Current Year												Preceding Year												
			None	\$1-\$1,000	\$1,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$5,000,000	\$5,000,001-\$25,000,000	\$25,000,001-\$50,000,000	Over \$50,000,000	Spouse/DC Asset over \$1,000,000*										I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII
	OOV Investments, LLC (Quick Quack car wash) Highland & American Fork, Utah																																															
	OOV Investments 2, LLC (Quick Quack car wash) Pleasant Grove & Ogden, Utah																																															
	OOV Investments 3, LLC (Quick Quack car wash) Springdale & Spanish Fork, Utah																																															
	Monticello Development Company, LLC - Monticello, Utah																																															
JT	AmBank checking account																																															
	Curtis Family Trust - assets below																																															
	- 786 S 1600 W Street, Provo, Utah																																															
	- Parcel #16-044-0008 in Weber County, Utah																																															
	- Parcel #9-8-19-13 in Kane County, Utah																																															
	- Zions Bank checking account																																															
	- Zions Bank Money Market account																																															
	Fidelity OTC Portfolio (sold)																																															
	Openheimer International Small-Mid Cap Growth Fund (sold)																																															
	T. Rowe Price International Discovery Fund (sold)																																															
	Deutsche Global Infrastructure Fund Class A (sold)																																															

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Use additional sheets if more space is required.

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Source (include date of receipt for honoraria)

[illegible]

SCHEDULE D - LIABILITIES

Name: John R. Curtis

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. New Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. *Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability					
				B \$10,001- \$50,000	D \$100,001- \$250,000	F \$500,001- \$1,000,000	H \$5,000,001- \$25,000,000	J Over \$50,000,000	
Example	First Bank of Wilmington, DE	5/99	Mortgage on Rental Property, Dover, DE		X				
	Wells Fargo	1/08	Second mortgage on 3302 N 140 W, Provo, Utah - paid in full 10/28/16			X			
	Zions First National Bank	11/10	Second mortgage on Bear Lake 8263, 2178 S Bear Lake Blvd, Garden City, Utah - paid in full 10/28/16		X				
	Zions First National Bank	1/10	Line of credit		X				

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. New Members and second-year candidates report positions held in the reporting period and the current calendar year. First-year candidates and new employees report positions held in the current calendar year and two previous years.

Position	Name of Organization
Mayor	City of Provo
Manager	Curtis Family Georgetown Condo, LLC
Manager	Curtis Family Brighton, LLC
Manager	John Ream Curtis 800 S Center SPE, LLC
Manager	Action Commercial Park, LLC

Use additional sheets if more space is required.

SCHEDULE D - LIABILITIES

Name: John R. Curtis

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. New Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and exceeded \$10,000. *Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability									
				A	B	C	D	E	F	G	H	I	J
					\$15,001- \$50,000		\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	Over \$25,000,000	
Example	First Bank of Wilmington, DE	5/98	Mortgage on Rental Property, Dover, DE				X						

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. New Members and second-year candidates report positions held in the reporting period and the current calendar year. First-year candidates and new employees report positions held in the current calendar year and two previous years.

Position	Name of Organization
Board member	Utah Municipal Power Authority
Board member	Utah National Parks Council of the Boy Scouts of America
Board member	Mountainland Association of Government
Board member	Utah County Council of Governments
Board member	Utah County Ice Sheet Authority

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Position	Name of Organization
Board member	Utah Lake Commission
Board member	Utah Valley Chamber of Commerce
Trustee	Utah Valley Healthcare Foundation
Board member	EDCUtah
Member	Monticarlo Development Company, Inc.

Use additional sheets if more space is required.

SCHEDULE D - LIABILITIES

Name: John R. Curtis

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Start the highest amount owed during the reporting period. New Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. *Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A	B	C	D	E	F	G	H	I	J	K
					\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$5,000,000	\$5,000,001-\$25,000,000	\$25,000,001-\$50,000,000	Over \$50,000,000	
Example	First Bank of Wilmington, DE	6/98	Mortgage on Rental Property, Dover, DE				X							

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. New Members and second-year candidates report positions held in the reporting period and the current calendar year. First-year candidates and new employees report positions held in the current calendar year and two previous years.

Position	Name of Organization
Limited partner	Peak Ventures Fund II, L.P.
Limited partner	Pleasant Grove Retail Ltd Partnership
Limited partner	Monticello Development Company, LLC
Limited partner	QQUV Investments, LLC; QQUV Investments 2, LLC; QQUV Investments 3, LLC
Trustee	Curtis family trust

SCHEDULE F – AGREEMENTS

Name: **John R. Curtis**

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Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement
None		

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

Report sources of compensation received by you or your business affiliation for services provided directly by you during the current year and two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule C.

Source (Name and City/State)	Brief Description of Duties
Example: Doe Jones & Smith, Hometown, Homestate	Accounting Services
See Schedule C	