



Filing ID #10015663

# FINANCIAL DISCLOSURE REPORT

---

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

---

## FILER INFORMATION

**Name:** Jess Phoenix  
**Status:** Congressional Candidate  
**State/District:** CA25

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 08/13/2017  
**Period Covered:** 01/01/2016– 05/15/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Acorns Aggressive Portfolio		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage Roth IRA - USAA	SP	\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Electro Scientific Industries, Inc. (ESIO)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity Investments 401(k)	SP	\$50,001 - \$100,000	Dividends, Interest	\$201 - \$1,000	\$5,001 - \$15,000
Ford Motor Company (F)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
HMS Holdings Corp (HMSY)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
J.C. Penney Company, Inc. Holding Company (JCP)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
R.R. Donnelley & Sons Company (RRD)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ Vanguard Roth IRA		\$15,001 - \$50,000	Tax-Deferred		
Snap Inc. Class A (SNAP)		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
USAA Precious Metals & Minerals Fund		\$1 - \$1,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Viavi Solutions Inc. (VIAV)		\$1 - \$1,000	Dividends	\$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
VMware	Spouse Salary	\$195,000.00	\$130,000.00
Pangolin Pictures	Science consulting	\$3,375.00	\$3,375.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Stonegate Mortgage	2015	Home mortgage	\$500,001 - \$1,000,000
JT	Chase Bank	Ongoing	Credit card	\$10,000 - \$15,000
SP	SoFi	August 2016	Student Loan	\$15,001 - \$50,000
	SoFi	July 2016	Student Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Blueprint Earth

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Roth IRA  
DESCRIPTION: Vanguard 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

## 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:** Jess Phoenix , 08/13/2017