



Filing ID #10008064

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Casey Lucius
Status: Congressional Candidate
State/District: CA20

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2015
Filing Date: 06/13/2015
Period Covered: 01/01/2014– 06/30/2015

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Blackrock ⇒ S&P 500	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
LOCATION: OH					
Individual investments ⇒ Amcap fund		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual investments ⇒ American High IncomeTrust		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual investments ⇒ Capital Income Builder Fund A		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Individual investments ⇒ Capital World Growth and Income fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual investments ⇒ EuroPacific Growth Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual investments ⇒ Fundamental Investors		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual investments ⇒ Growth Fund of America		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual investments ⇒ Income Fund of America		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual investments ⇒ New World Fund		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Individual investments ⇒ Small Cap World Fund		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Navy Federal Credit Union checking	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Navy Federal Credit Union savings	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Navy Federal Money Market	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Roth ⇒ AmCap Fund CL	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ American High IncomeTrust	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ Capital World Bond Fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ Capital World Growth and Income Fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ Europacific Growth fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ Fundamental Investors Fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ Intermediate bond fund of america	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ investment company of america fund	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth ⇒ new economy fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ new world fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ small cap world fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth ⇒ Washington mutual investors fund	SP	\$1,001 - \$15,000	Tax-Deferred		

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Department of the Navy Naval War College	salary for prior teaching	N/A	\$60,000
City of Pacific Grove	City Council stipend	\$4,200	\$2,100
Humane Society of the USA	spouse salary	\$68,000	\$35,000

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Secretary	Kairos Coalition

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

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- Blackrock (Owner: DC)
LOCATION: CA
- Individual investments
LOCATION: US
- Roth (Owner: SP)

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: Casey Lucius , 06/13/2015