



Filing ID #10000187

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Jeffrey Marlin Phillips
Status: Congressional Candidate
State/District: NCo6

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2014
Filing Date: 03/30/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds IRA		\$1,001 - \$15,000	None		
First Citizens Bank - Checking Account		\$15,001 - \$50,000	None		
LPL Brokerage Account - Cash		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
LPL IRA Brokerage Account		\$50,001 - \$100,000	None		
Phillips Wealth Management LLC		\$500,001 - \$1,000,000	Earned Income	\$50,001 - \$100,000	\$100,001 - \$1,000,000
LOCATION: Greensboro/Guilford, NC, US DESCRIPTION: Investment Management Firm - Earned Income					
Prudential IRA		\$1,001 - \$15,000	None		
DESCRIPTION: Variable Annuity					

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
LPL Financial/Phillips Wealth Management LLC	Client Investment Advisory Services	\$50,500	\$200,000
Guilford County	Guilford County Commissioner	\$5,000	\$20,000

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
President, Co-Founder	Men of Vision & Excellence
Managing Director	Phillips Wealth Management LLC
Board Member	Gateway Charter Academy
Liason to Board of Guilford County Commissioners	Greensboro Partnership Economic Development Board of Trustees
Liason to Board of Guilford County Commissioners	Downtown Greensboro Incorporated
Liason to Guilford County Board of Commissioners	Greensboro Public Library
Liason to Guilford County Board of Commissioners	Guilford County Animal Shelter

SCHEDULE F: AGREEMENTS

None disclosed.

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

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: Jeffrey Marlin Phillips , 03/30/2014