



Filing ID #10018201

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Kathleen Allen
Status: Congressional Candidate
State/District: GA07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 07/20/2017
Period Covered: 01/01/2016– 06/30/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allen Family Bank Accounts ⇒ Bank of America Accounts	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Allen Family Bank Accounts ⇒ First Tech Bank Accounts	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Allen Family Bank Accounts ⇒ Regions Bank Accounts	JT	\$15,001 - \$50,000	None		
Ameriprise ONE Financial Account ⇒ WARAX WELLS FARGO ABSOLUTE RETURN CL A	JT	\$1,001 - \$15,000	None		
Annalisa Allen 529 ⇒ FDIC-Insured Accounts LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Annalisa Allen 529 ⇒ Vanguard Developed Markets Index LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Annalisa Allen 529 ⇒ Vanguard Emerging Mkt Stock Index	DC	\$1 - \$1,000	Tax-Deferred		
LOCATION: UT					
Annalisa Allen 529 ⇒ Vanguard Short-Term Bond Index	DC	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: UT					
Annalisa Allen 529 ⇒ Vanguard Short-Term Invest-Grade	DC	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: UT					
Annalisa Allen 529 ⇒ Vanguard Total Bond Market Index	DC	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: UT					
Annalisa Allen 529 ⇒ Vanguard Total Stock Market Index	DC	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: UT					
Cooper Allen 529 ⇒ FDIC-Insured Accounts	DC	\$1 - \$1,000	Tax-Deferred		
LOCATION: UT					
Cooper Allen 529 ⇒ Vanguard Developed Markets Index	DC	\$1 - \$1,000	Tax-Deferred		
LOCATION: UT					
Cooper Allen 529 ⇒ Vanguard Emerging Mkt Stock Index	DC	\$1 - \$1,000	Tax-Deferred		
LOCATION: UT					
Cooper Allen 529 ⇒ Vanguard Short-Term Bond Index	DC	\$1 - \$1,000	Tax-Deferred		
LOCATION: UT					
Cooper Allen 529 ⇒ Vanguard Short-Term Invest-Grade	DC	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: UT					
Cooper Allen 529 ⇒ Vanguard Total Bond Market Index	DC	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: UT					
Cooper Allen 529 ⇒	DC	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Total Stock Market Index					
LOCATION: UT					
ERIC DOUGLAS ALLEN IRA ⇒ Aetna Inc. (AET)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Alphabet Inc. - Class A (GOOGL)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Ameriprise Insured Money Market	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ AMFAX NATIXIS ASG MANAGED FUTURES STRATEGY CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Amgen Inc. (AMGN)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ ANZAX ALLIANZGI CONVERTIBLE CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ BASIX BLACKROCK STRATEGIC INCOME OPPTYS INVESTOR CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ BXMDX BLACKSTONE ALTERNATIVE MULTI STRATEGY CL D	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ China Mobile Limited (CHL)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Cisco Systems, Inc. (CSCO)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ COSIX COLUMBIA STRATEGIC INCOME CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ D/B/A Chubb Limited New (CB)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Deutsche X-trackers MSCI EAFE Hedged Equity ETF (DBEF)	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ERIC DOUGLAS ALLEN IRA ⇒ Dreyfus Govt Cash Mgt Admin Class	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ EGRAX EATON VANCE GLOBAL MACRO ABSOLUTE RETURN ADVNTG CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ EKJAX WELLS FARGO PREMIER LARGE COMPANY GROWTH CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Extra Space Storage Inc (EXR)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Exxon Mobil Corporation (XOM)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ GAMDX GOLDMAN SACHS LOCAL EMERGING MARKETS DEBT CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Home Depot, Inc. (HD)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Honeywell International Inc. (HON)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ iShares 1-3 Year Treasury Bond ETF (SHY)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ iShares 7-10 Year Treasury Bond ETF (IEF)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ iShares Core MSCI EAFE ETF (IEFA)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ iShares MSCI EAFE Value ETF (EFV)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares TIPS Bond ETF (TIP)					
ERIC DOUGLAS ALLEN IRA ⇒ JEVAX JOHN HANCOCK EMERGING MARKETS CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ JHAAX JOHN HANCOCK GLOBAL ABSOLUTE RETURN STRAT CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ JP Morgan Chase & Co. (JPM)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ JVAAX JPMORGAN VALUE ADVANTAGE CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ LCCAX COLUMBIA CONTRARIAN CORE CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ LIFAX LORD ABBETT INFLATION FOCUSED CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Lockheed Martin Corporation (LMT)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ LROAX LEGG MASON BW ABSOLUTE RETURN OPPTYS CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ MBFAX WELLS FARGO CORE BOND CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ MGRAX MFS INTL GROWTH CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Microsoft Corporation (MSFT)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Microsoft Corporation (MSFT)	SP	\$15,001 - \$50,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ OPGIX OPPENHEIMER GLOBAL OPPTYS CL A	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ERIC DOUGLAS ALLEN IRA ⇒ Oracle Corporation (ORCL)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ PDBAX PRUDENTIAL TOTAL RETURN BOND CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Pepsico, Inc. (PEP)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ PowerShares Emerging Markets Sovereign Debt Portfolio (PCY)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ PowerShares Exchange-Traded Fund Trust ETF (BKLN)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ PRDAX PRINCIPAL DIVERSIFIED REAL ASSET CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Public Storage (PSA)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ PVSAX PUTNAM CAPITAL SPECTRUM CL A	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Schlumberger N.V. (SLB)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Sealed Air Corporation (SEE)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ SPDR Bloomberg Barclays Short Term High Yield Bond ETF (SJNK)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Unilever PLC (UL)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Vanguard Mid-Cap ETF - DNQ (VO)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Short-Term Corporate Bond ETF (VCSH)					
ERIC DOUGLAS ALLEN IRA ⇒ Vanguard Small-Cap ETF - DNQ (VB)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Visa Inc. (V)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN IRA ⇒ Walt Disney Company (DIS)	SP	\$1,001 - \$15,000	Tax-Deferred		
ERIC DOUGLAS ALLEN SEP IRA ⇒ ERIC DOUGLAS ALLEN SEP IRA	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Cash					
Kathleen Allen KP Pensions ⇒ Physicians and Employees Retirement Plan		Undetermined	Tax-Deferred		
DESCRIPTION: Value Determined at Retirement					
Kathleen Allen KP Pensions ⇒ Salaried Retirement Plan-Plan A		Undetermined	Tax-Deferred		
DESCRIPTION: Value Determined at Retirement					
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ Alger Capital Appreciation Fund Class Z		\$50,001 - \$100,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ KP Retirement Path 2035		\$15,001 - \$50,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ KP Small Cap Equity Fund Institutional Shares		\$1,001 - \$15,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ T. Rowe Price International Discovery Fund I Class		\$1,001 - \$15,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ Vanguard Institutional Total Stock Market Index Fund Institutional Plus Shares		\$15,001 - \$50,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ Vanguard International Growth Fund Admiral Shares		\$15,001 - \$50,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ Vanguard Wellington Fund Admiral Shares		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
KATHLEEN H ALLEN IRA ⇒ AMFAX NATIXIS ASG MANAGED FUTURES STRATEGY CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ ANZAX ALLIANZGI CONVERTIBLE CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ BASIX BLACKROCK STRATEGIC INCOME OPPTYS INVESTOR CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ BXMDX BLACKSTONE ALTERNATIVE MULTI STRATEGY CL D		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ COSIX COLUMBIA STRATEGIC INCOME CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ Deutsche X-trackers MSCI EAFE Hedged Equity ETF (DBEF)		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ Dreyfus Govt Cash Mgt Admin Class		\$1 - \$1,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ EGRAX EATON VANCE GLOBAL MACRO ABSOLUTE RETURN ADVNTG CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ EKJAX WELLS FARGO PREMIER LARGE COMPANY GROWTH CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ GAMDX GOLDMAN SACHS LOCAL EMERGING MARKETS DEBT CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ iShares MSCI EAFE Value ETF (EFV)		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ JEVAX JOHN HANCOCK EMERGING MARKETS CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JHAAX JOHN HANCOCK GLOBAL ABSOLUTE RETURN STRAT CL A					
KATHLEEN H ALLEN IRA ⇒ JVAAX JPMORGAN VALUE ADVANTAGE CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ LCCAX COLUMBIA CONTRARIAN CORE CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ LIFAX LORD ABBETT INFLATION FOCUSED CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ LROAX LEGG MASON BW ABSOLUTE RETURN OPPTYS CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ MBFAX WELLS FARGO CORE BOND CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ MGRAX MFS INTL GROWTH CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ OPGIX OPPENHEIMER GLOBAL OPPTYS CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ PDBAX PRUDENTIAL TOTAL RETURN BOND CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ PRDAX PRINCIPAL DIVERSIFIED REAL ASSET CL A		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ PVSAX PUTNAM CAPITAL SPECTRUM CL A		\$1,001 - \$15,000	Tax-Deferred		
Kathleen KP Supplemental Ret Plan B ⇒ KP Retirement Path 2035 Fund Institutional Shares		\$15,001 - \$50,000	Tax-Deferred		
Tinnaeus, Inc., 100% Interest	SP	\$100,001 - \$250,000	Shareholder Distributions	\$15,001 - \$50,000	\$50,001 - \$100,000
LOCATION: Norcross, GA, US					
DESCRIPTION: Software development.					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Kaiser Foundation Health Plan	Kathleen Salary	\$89,000.00	\$87,000.00
Tinnaeus, Inc.	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Officer - President	Paid In America, Inc.
COMMENTS: 501c(3) nonprofit organization	
Employee	Kaiser Foundation Health Plan, Inc.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">Allen Family Bank Accounts (Owner: JT) LOCATION: USAmeriprise ONE Financial Account (Owner: JT) LOCATION: USAnnalisa Allen 529 (Owner: DC) LOCATION: UT DESCRIPTION: Gramma Margy invested for kid.Cooper Allen 529 (Owner: DC) LOCATION: UT DESCRIPTION: Gramma Margy invested for kid.ERIC DOUGLAS ALLEN IRA (Owner: SP)ERIC DOUGLAS ALLEN SEP IRA (Owner: SP)Kathleen Allen KP Pensions LOCATION: US

DESCRIPTION: Value Determined at Retirement

- Kathleen Allen KP Tax Sheltered Annuity Plan
- KATHLEEN H ALLEN IRA
- Kathleen KP Supplemental Ret Plan B

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: Kathleen Allen , 07/20/2017