



Filing ID #10026699

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Chris Lewis  
**Status:** Congressional Candidate  
**State/District:** AL05

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 07/11/2019  
**Period Covered:** 01/01/2018– 07/1/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Century Ultra [MF]		\$100,001 - \$250,000	Tax-Deferred		
Chris Keri JT MF ⇒ American Funds Fundamental Investor CL A [MF]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$1,001 - \$2,500
Chris Keri JT MF ⇒ American Funds New World Fund CL A [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$201 - \$1,000
Chris Keri JT MF ⇒ American Funds Small CAP WLD A [MF]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1,001 - \$2,500
Chris Keri JT MF ⇒ American Funds The New Economy Fund CL A [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$201 - \$1,000
Chris Lewis Roth IRA ⇒ American Funds AMCAP Fund CL A [MF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DC-1 American Funds Balanced 529 FD CL A [5P] LOCATION: VA		\$15,001 - \$50,000	Tax-Deferred		
DC-2 American Funds Balanced 529 FD CL A [5P] LOCATION: VA		\$15,001 - \$50,000	Tax-Deferred		
First Southern Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Keri Lewis Rollover ⇒ JPMorgan Investor Growth Fund CL A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Keri Lewis Roth IRA ⇒ American Funds AMCAP Fund CL A [MF]		\$50,001 - \$100,000	Tax-Deferred		
Keri Lewis Roth IRA ⇒ American Funds Washington Mutual Investors CL A [MF]		\$50,001 - \$100,000	Tax-Deferred		
Lewis Family Trust ⇒ New York Life Insurance and Annuity Corporation Survivorship Variable Universal Life ⇒ Fidelity VIP Contrafund Portfolio Initial Class [MF]		\$15,001 - \$50,000	Tax-Deferred		
Lewis Family Trust ⇒ New York Life Insurance and Annuity Corporation Survivorship Variable Universal Life ⇒ MainStay VP Bond Initial Class [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lewis Family Trust ⇒ New York Life Insurance and Annuity Corporation Survivorship Variable Universal Life ⇒ MainStay VP Janus Henderson Balanced Initial Class [MF]		\$15,001 - \$50,000	Tax-Deferred		
Lewis Family Trust ⇒ New York Life Insurance and Annuity Corporation Survivorship Variable Universal Life ⇒ MainStay VP MacKay S&P500 Index [MF]		\$15,001 - \$50,000	Tax-Deferred		
Lewis Farms, 100% Interest [FA]  LOCATION: Florence, AL, US DESCRIPTION: Small Family Goat and Cattle Farm		\$15,001 - \$50,000	Farm Income	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Limestone Street Holding INC, 10% Interest [OL] LOCATION: Florence / Lauderdale, AL, US DESCRIPTION: Corporate entity used to close out North Alabama Insurance Inc (NAI) affairs after NAI was purchased by another entity.		\$1,001 - \$15,000	Corp Income	None	None
Navy Federal Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Patton Island Consulting, 100% Interest [OL] LOCATION: Florence, AL, US DESCRIPTION: Program Management & Solutions Consultant		\$1 - \$1,000	S Corp Income	None	None
Rental Home Pensacola FL [RE]		\$50,001 - \$100,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
Retirement Systems of Alabama-1 ⇒ RSA-1 Stock Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Teachers' Retirement System of Alabama [DB]		Undetermined	None		
US Series EE Savings Bonds [GS]		\$1,001 - \$15,000	Interest	None	None
USAA [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
WF Brokerage Account 1 ⇒ Money Market [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
QuantiTech	Salary	N/A	\$104,750.35
Tuscumbia City Board of Education	Spouse Salary	N/A	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Home Mortgage	Nov 2012	Rental Home	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
President	Childrens' Museum of the Shoals
Vice Chairman	Florence / Lauderdale County Tourism Board
Member	St. Florian Alabama Planning Commission

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Chris Keri JT MF  
LOCATION: US
- Chris Lewis Roth IRA
- Keri Lewis Rollover
- Keri Lewis Roth IRA
- Lewis Family Trust
- Lewis Family Trust ⇒ New York Life Insurance and Annuity Corporation Survivorship Variable Universal Life
- Retirement Systems of Alabama-1
- WF Brokerage Account 1  
LOCATION: US

## 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:** Chris Lewis , 07/11/2019