



Filing ID #10031151

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Andrew Peter Bales
Status: Congressional Candidate
State/District: IN05

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 02/21/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American United Life Insurance 401K [PE] DESCRIPTION: Cashed in 401K from previous employer		\$1,001 - \$15,000	Dividends	\$5,001 - \$15,000	None
Foresters Financial IRA ⇒ Equity Income Fund A [OT] DESCRIPTION: Asset of IRA 36V 00001003297		\$15,001 - \$50,000	None		
Foresters Financial IRA ⇒ Government Cash Management Fund A [OT] DESCRIPTION: OAV 00003611779		\$1,001 - \$15,000	None		
Foresters Financial IRA ⇒ Growth and Income Fund A [OT] DESCRIPTION: 37V 00002011322		\$15,001 - \$50,000	None		
Foresters Financial IRA ⇒ Select Growth Fund A [OT] DESCRIPTION: 42V 000007744100		\$15,001 - \$50,000	None		
Foresters Financial IRA ⇒		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Special Situation Fund A [OT] DESCRIPTION: Fund 32V 00001315616					
Foresters Financial IRA ⇒ Total Return Fund A [OT] DESCRIPTION: OPV 00001026269					
State Street Retiree Services [PE]		Undetermined	Pension Distribution	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: Spouses Pension monthly distribution					

* 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
Health And Hospital Corporation of Marion County	Salary	\$39,938.51	\$62,826.96

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Navient	1996	Student Loans	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

◦ Foresters Financial IRA DESCRIPTION: Individual IRA
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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: Andrew Peter Bales , 02/21/2020