



Filing ID #10013200

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Mr. Christopher Robert Morse
Status: Congressional Candidate
State/District: MI09

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2016
Filing Date: 06/25/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ally Bank Account	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
AXA Equitable Life Insurance		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: All dividends are re-invested to the policy.					
Bayer Vanguard Retirement Plan, 100% Interest	SP	\$15,001 - \$50,000	ROTH 401k	None	None
DESCRIPTION: Bayer 401k Plan with 100% vested and retirement distribution determined in future.					
Charles Schwab - Deposit Account		\$1,001 - \$15,000	Interest	None	None
Charles Schwab - Spouse IRA ⇒ Bayer Aktiengesellschaft American Depositary Shares (BAYRY)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - Spouse IRA ⇒ Celgene Corporation (CELG)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - Spouse IRA ⇒ International Paper Company (IP)	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab - Spouse IRA ⇒ Nissan Motor Co., Ltd. American Depositary Shares (NSANY)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - Spouse IRA ⇒ Schwab International Index Fund® (SWISX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - Spouse IRA ⇒ Schwab Small-Cap Index Fund® (SWSSX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - Spouse IRA ⇒ Schwab Total Stock Market Index Fund® (SWTSX)	SP	\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab - Spouse ROTH IRA ⇒ American Capital Agency Corp. (AGNC)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Spouse ROTH IRA ⇒ Schwab Total Stock Market Index Fund® (SWTSX)	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Charles Schwab Decedent IRA ⇒ American Capital Agency Corp (AGNC)		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Decedent IRA ⇒ Charles Schwab Money Market		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Decedent IRA ⇒ Cisco Systems, Inc. (CSCO)		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Decedent IRA ⇒ General Electric Company (GE)		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Decedent IRA ⇒ Hewlett Packard Enterprise Company (HPE)		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Decedent IRA ⇒ HP Inc. (HPQ)		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Decedent IRA ⇒ Intel Corporation (INTC)		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Decedent IRA ⇒ International Business Machines Corporation (IBM)		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab Decedent IRA ⇒ Microsoft Corporation (MSFT)		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Decedent IRA ⇒ NetApp, Inc. (NTAP)		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab ROTH IRA ⇒ Advanced Micro Devices, Inc. (AMD)		\$15,001 - \$50,000	Dividends	None	None
Charles Schwab ROTH IRA ⇒ American Capital Agency Corp (AGNC)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Charles Schwab ROTH IRA ⇒ American Funds Capital Income Builder® Class A (CAIBX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab ROTH IRA ⇒ American Funds Capital World Growth and Income Fund® Class A (CWGIX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab ROTH IRA ⇒ American Funds Investment Company of America® Class A (AIVSX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab ROTH IRA ⇒ American Funds The Bond Fund of America® Class A (ABNDX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab ROTH IRA ⇒ American Funds The Growth Fund of America® Class A (AGTHX)		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Charles Schwab ROTH IRA ⇒ Franklin Gold and Precious Metals Fund Class A (FKRCX)		\$1,001 - \$15,000	Dividends	None	None
Charles Schwab ROTH IRA ⇒ Franklin Natural Resources Fund Class A (FRNRX)		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Charles Schwab ROTH IRA ⇒ Navios Maritime Partners LP Common Units Representing Limited Partner Interests (NMM)		\$1,001 - \$15,000	Dividends	None	\$1,001 - \$2,500
Discover Bank Account	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Edward Jones Profit Sharing ⇒ Edward Jones 401k and Profit Sharing, 100% Interest		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 100% vested Profit Sharing Plan from Edward Jones.					
Franklin Michigan Tax-Free Income Fund Class A (FTTMX)		\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
General Electric Company (GE)		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Intel Corporation (INTC)		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
International Business Machines Corporation (IBM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
J.M. Smucker Company (SJM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Johnson & Johnson (JNJ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Loan to Morse for Congress		\$1,001 - \$15,000	None		
DESCRIPTION: No Interest Loan to Campaign Committee.					
Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Monsanto Pension	SP	\$15,001 - \$50,000	Tax-Deferred		
Navios Maritime Holdings Inc. (NM)		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Navy Federal Credit Union Bank Accounts	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Combined Personal and Joint Checking and Savings Accounts.					
Rental Property-Michigan		\$250,001 - \$500,000	Rent	None	\$15,001 - \$50,000
LOCATION: Bloomfield Hills, MI, US					
DESCRIPTION: Rental property located at: 5170 Deep Wood Road Bloomfield Hills, MI 48302					
Schwab Small-Cap Index Fund® (SWSSX)	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Total Stock Market Index Fund® (SWTSX)	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
State Street Corporation (STT)		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Sysco Corporation (SYI)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
USAA Bank Accounts	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Valero Energy Corporation (VLO)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Walgreens Boots Alliance, Inc. (WBA)		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Bayer CropScience	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Navy Federal Credit Union	October 2012	Home Mortgage On House in Michigan	\$100,001 - \$250,000
JT	USAA Joint Credit Card	December 2015	Credit Card Balance for December 2015	\$10,000 - \$15,000
	COMMENTS: Balance was paid off in January 2016.			

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

- Charles Schwab - Spouse IRA (Owner: SP)
- Charles Schwab - Spouse ROTH IRA (Owner: SP)
- Charles Schwab Decedent IRA
- Charles Schwab ROTH IRA
- Edward Jones Profit Sharing

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: Mr. Christopher Robert Morse , 06/25/2016