



Filing ID #10029147

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Jeanne Ives  
**Status:** Congressional Candidate  
**State/District:** IL06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 10/14/2019  
**Period Covered:** 01/01/2018– 09/30/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401K ⇒ Dlwr SM Cap val Inst [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
401K ⇒ FID 500 Index [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
401K ⇒ FID Diversified Intl K [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID Extd Mkt Idx [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID Growth Co K [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID Low Priced Stk K [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID OTC K [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401K ⇒ FID US Bonds Idx [CS]  DESCRIPTION: bond	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ FID Worldwide [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ I O Develop Mkt Y [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ JAN ASP Enterprise I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ Jhancock Dscpl Val I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ Metwest TOT RTN BD ! [CS]  DESCRIPTION: Bond	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ PRU Guaranteed Inc [CS]  DESCRIPTION: bond	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ TRP New Horizons [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ Vang Div Growth INV [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ Victory S EST Val R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA EMERGING MARKETS CORE EQUITY I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA FIVE-YEAR GLOBAL FIXED PTF [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA INTERM GOVT FIXED INCOME I [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DFA INTERNATIONAL VALUE I [MF]					
Edelman Financial/Ameritrade Account ⇒ DFA INTL SM CAP VAL PORT [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA LARGE CAP INTERNATIONAL I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA SHORT M TREASURY ADMIRAL [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA SHORT RM EXT QUALITY PTF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA US LARGE CAP VAL PORT [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ DFA US SMALL CAP I [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ Federated Investments Federated Treasury Oblig Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ Federated Investments Federated Treasury Oblig Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ ISHARES Trust [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Edelman Financial/Ameritrade Account ⇒ ISHARES TRUST CORE S&P MCP ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ ISHARES TRUST EXPONENTIAL TECH ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ ISHARES TRUST IBOXFX INV CP ET [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ ISHARES TRUST RUS 1000 VAL ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SPOR INDEX SHARES FUNDS S&P NORTH AMER ETF [EF]					
Edelman Financial/Ameritrade Account ⇒ SPORS INDEX SHARES FUNDS [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Edelman Financial/Ameritrade Account ⇒ VANGUARD GROWTH ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ VANGUARD REAL ESTATE ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edelman Financial/Ameritrade Account ⇒ VANGUARD REAL ESTATE ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ VANGUARD TOTAL BND MRKT ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Edelman Financial/Ameritrade Account ⇒ VANGUARD TOTAL STK MKT ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Edelman Financial/Ameritrade Account ⇒ Edelman Financial/Ameritrade UGMA/UTMA ⇒ Federated Investments Federated Treasury Oblig Fund [MF]	SP	\$1 - \$1,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ Edelman Financial/Ameritrade UGMA/UTMA ⇒ ISHARES TRUST RUS 1000 VAL ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ Edelman Financial/Ameritrade UGMA/UTMA ⇒ SPDR INDEX SHARES FUNDS S&P NORTH AMER ETF [EF]	SP	\$1 - \$1,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ Edelman Financial/Ameritrade UGMA/UTMA ⇒ VANGUARD REAL ESTATE ETF [EF]	SP	\$1 - \$1,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Edelman Financial/Ameritrade Account ⇒ Edelman Financial/Ameritrade UGMA/UTMA ⇒ VANGUARD TOTAL BND MRKT ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year

\* 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
State of Illinois	salary		\$78,241.00
Abstinence & Marriage Partnership	speech	\$ .00	\$1,000.00
Henkels & McCoy	spouse salary	\$129,162.00	\$172,216.00
Prairie Fire LLC	owner income	\$25,000.00	N/A

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Member, Board of Directors	Illinois Right to Life Action

### 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"> <li>401K (Owner: SP) DESCRIPTION: Henkels &amp; McCoy 401k</li> <li>Edelman Financial/Ameritrade Account (Owner: SP)</li> <li>Edelman Financial/Ameritrade Account ⇒ Edelman Financial/Ameritrade UGMA/UTMA (Owner: SP) LOCATION: US</li> </ul>
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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:** Jeanne Ives , 10/14/2019