



Filing ID #10019376

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Mrs. Karen Powers Mallard
Status: Congressional Candidate
State/District: VA02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 11/12/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|--------------------|----------------|-------------------------------|-----------------------|
| Am Funds Global SC Fund | | \$1,001 - \$15,000 | None | | |
| Barclays Ag Bd Idx Port | | \$1,001 - \$15,000 | None | | |
| BlaBDckrock HI YLD | SP | \$1,001 - \$15,000 | None | | |
| Blackrock Advantage LRG Cap Core Fund CL A | SP | \$1,001 - \$15,000 | None | | |
| Blackrock Advantage LRG CAP Core Fund CL A | SP | \$1 - \$1,000 | None | | |
| Blackrock Capital Appreciation FD, INC C | SP | \$1 - \$1,000 | None | | |
| Blackrock Capital Appreciation FD, INC, A | SP | \$1,001 - \$15,000 | None | | |
| Blackrock Equity Dividend FD C | SP | \$1 - \$1,000 | None | | |
| Blackrock Equity Divident FD A | SP | \$1,001 - \$15,000 | None | | |

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| Blackrock Global Allocation FD INC A | SP | \$1,001 - \$15,000 | None | | |
| Blackrock Global Allocation FD INC C | SP | \$1 - \$1,000 | None | | |
| Blackrock Global SMALLCAP FD INC A | SP | \$1,001 - \$15,000 | None | | |
| Blackrock Global Smallcap FD INC C | SP | \$1 - \$1,000 | None | | |
| Blackrock Higy YLD Bond Port Class C | SP | \$1 - \$1,000 | None | | |
| Blackrock International FD A | SP | \$1,001 - \$15,000 | None | | |
| Blackrock International FD C | SP | \$1 - \$1,000 | None | | |
| Blackrock Low Duration Bond Fund CL A | SP | \$1,001 - \$15,000 | None | | |
| Blackrock Low Duration Bond Fund CL C | SP | \$1 - \$1,000 | None | | |
| Blackrock Strategic Income OPPS PTF C | SP | \$1 - \$1,000 | None | | |
| Blackrock Strategic Incopme OPPS PTF A | SP | \$1,001 - \$15,000 | None | | |
| Blackrock Total Return Fund CL A | SP | \$1,001 - \$15,000 | None | | |
| Blackrock Total Return Fund CL C | SP | \$1 - \$1,000 | None | | |
| Cash/Money Accts | SP | \$1,001 - \$15,000 | None | | |
| Clearbridge Agg Gr Port | | \$1,001 - \$15,000 | None | | |
| Harris Oakmark Intrntnl | | \$1 - \$1,000 | None | | |
| Invesco Mid Cap Value | | \$1,001 - \$15,000 | None | | |
| Invesco Small Cap Growt | | \$1 - \$1,000 | None | | |
| Metlife Small Cap Val | | \$1,001 - \$15,000 | None | | |
| Mt/wellXCoEquityOpp | | \$1,001 - \$15,000 | None | | |

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|-----------------------------|-------|--------------------|----------------|-------------------------------|-----------------------|
| T Rowe LgCpGr | | \$1,001 - \$15,000 | None | | |
| TRP Mid Cap Growth | | \$1 - \$1,000 | None | | |
| TRP Small Cap Growth | | \$1 - \$1,000 | None | | |
| Virginia Retirements System | | Undetermined | None | | |
| Wal-Mart Stores, Inc. (WMT) | | \$1 - \$1,000 | None | | |
| Walt Disney Company (DIS) | | \$1 - \$1,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Wstrn Asst Mgt Strag Bd | | \$1 - \$1,000 | None | | |

SCHEDULE C: EARNED INCOME

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|------------------------------|---------------|-------------------------------|-----------------------|
| Chesapeake Public Schools | salary | \$60,000.00 | \$67,000.00 |
| The Teachers Treasure Chest | Commission | \$3,600.00 | \$6,900.00 |
| Virginia Carolina Steel Inc. | Spouse Salary | \$60,000.00 | \$62,000.00 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-------------------------------|----------------|--|-----------------------|
| DC | Chartway Federal Credit Union | May 2017 | Truck loan | \$10,000 - \$15,000 |
| JT | Nationstar Mortgagae | April 1998 | Mortgage on home in Virginia Beach, VA | \$100,001 - \$250,000 |
| JT | Chase Visa | July 2013 | Credit card low interest transfers | \$10,000 - \$15,000 |
| | Nelnet , Inc | September 2016 | Parent Plus Loans | \$15,001 - \$50,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|---------------------|--|
| President | Floyd E. Kellam High School PTSA |
| Recording Secretary | Floyd E. Kellam High School PTSA |
| Director | Tidewater Blackhawks Showcase Baseball |

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

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: Mrs. Karen Powers Mallard , 11/12/2017