



Filing ID #10029022

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Richard Kennedy
Status: Congressional Candidate
State/District: TX17

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 08/10/2019
Period Covered: 01/01/2018– 07/31/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley IRA ⇒ Brighthouse Life Ins Variable Annuity [OT] DESCRIPTION: Variable Annuity		\$50,001 - \$100,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Cash [OT] DESCRIPTION: Cash held in IRA		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA [OT] DESCRIPTION: IRA		\$50,001 - \$100,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Baillie Gifford International Stock Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ BlackRock Bond Income Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Annuity ⇒ BlackRock Capital Appreciation Portfolio [MF]					
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ BlackRock High Yield Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Brighthouse Small Cap Value Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Brighthouse/Aberdeen Emerging Markets Equity Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Brighthouse/Artisan International Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Brighthouse/Artisan Mid Cap Value Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Brighthouse/Dimensional International Small Company Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Brighthouse/Eaton Vance Floating Rate Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Brighthouse/Templeton International Bond Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ BrightHouse/Wellington Core Equity Opportunities Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Brighthouse/Wellington Large Cap Research Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Clarion Global Real Estate Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ ClearBridge Aggressive Growth Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Frontier Mid Cap Growth Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Harris Oakmark International Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Invesco Comstock Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Invesco Small Cap Growth Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Jennison Growth Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ JP Morgan Core Bond Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ JP Morgan Small Cap Value Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Loomis Sayles Small Cap Growth Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ MFS Research International Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MFS Value Portfolio [MF]					
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Morgan Stanley Mid Cap Growth Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Neuberger Berman Genesis Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Oppenheimer Global Equity Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ PIMCO Inflation Protected Bond Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ PIMCO Total Return Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ T. Rowe Price Large Cap Growth Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ T. Rowe Price Large Cap Value Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ T. Rowe Price Mid Cap Growth Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ T. Rowe Price Small Cap Growth Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ TCW Core Fixed Income Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ VanEck Global Natural Resources Portfolio [MF]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Wells Capital Management Mid Cap Value Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ Brighthouse Variable Annuity ⇒ Western Asset Management Strategic Bond Opportunities Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		

* 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
Encore Business Solutions	Independent contractor - project management	\$70,538.67	\$72,567.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Sarah Blue	February 2019	Personal loan, consolidation of debt	\$15,001 - \$50,000
	American Express	January 2019	Credit card debt	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Project Manager	Sopris Systems, LLC
Project Manager	Randstad Professionals US LP
Consultant	Encore Business Solutions
Employee	Encore Business Solutions

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Encore Business Solutions (Winnipeg, CA)	Independent Contractor - Project Manager

SCHEDULE A ASSET CLASS DETAILS

- Morgan Stanley IRA
- Morgan Stanley IRA ⇒ Brighthouse Variable Annuity

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: Richard Kennedy , 08/10/2019