



Filing ID #10032362

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jason Atkinson
Status: Congressional Candidate
State/District: OR02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 01/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jackson National Perspective 2 ⇒ Jackson National Perspective 2 [OT]		\$50,001 - \$100,000	None		
DESCRIPTION: Death Benefit \$50,932.84 Income Base \$ 73,107.26					
Jackson National Perspective 2 ⇒ Jackson National Perspective 2 [OT]		\$100,001 - \$250,000	None		
DESCRIPTION: Death Benefit- asset is a sub holding of Non-Tax Qualified					
MFS Massachusetts Investors Trust Class A [MF]		\$15,001 - \$50,000	None		
DESCRIPTION: Traditional IRA					
MFS Massachusetts Investors Trust Class C [MF]		\$15,001 - \$50,000	None		
DESCRIPTION: Traditional IRA					
Variable Universal Life Insurance Polich [OT]		\$1,000,001 - \$5,000,000	None		
DESCRIPTION: Death Benefit- Nationwide Variable Universal Life Insurance Policy					

* 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
J.A. Atkinson Enterprises. LLC	Salary	\$101,655.00	\$42,571.00
Atkinson Barrett LLC	salary	\$136,824.00	\$120,209.00
Dr. Catt DMD	spouse salary	\$37,709.00	\$35,647.00

SCHEDULE D: LIABILITIES

None disclosed.

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

- Jackson National Perspective 2
DESCRIPTION: Jason Atkinson Death Benefit \$128,227.99 Income Base \$174,427.40

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: Jason Atkinson , 01/13/2020