



Filing ID #10022129

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Gerald E. Connolly  
**Status:** Member  
**State/District:** VA11

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2017  
**Filing Date:** 05/14/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bristol-Myers Squibb Company (BMY) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Coca-Cola Company (KO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Congressional Federal Credit Union [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Dominion Resources, Inc. (D) [ST]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Express Scripts Holding Company (ESRX) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fairfax County Retirement Fund Employee Plan BG - not self-directed [DB]		\$15,001 - \$50,000	Mandatory Distribution	\$15,001 - \$50,000	<input type="checkbox"/>
Leidos Holdings, Inc. (LDOS) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Merck & Company, Inc. Common Stock (MRK) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch IRA ⇒ AMERICAN CAPITAL WLD GRW & INC CL C [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ AMERICAN CAPITAL WORLD GROWTH & INCOME CL F1 [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ BANK OF AMERICA, NA RASP [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ BLACKROCK GLOBAL ALLOCATION FD INC C [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ CALAMOS GROWTH FUND CL C [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ EATON VANCE FLT-RT INC INCOME TRUST [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ HOTCHKIS & WILEY LARGE CAP VALUE FUND CL C [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ iShares Core S&P Small-Cap LCap 600 Index Fund [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA ⇒ Vanguard REIT ETF [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Met Life Insurance Policy Cash Value [WU]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Met Life Insurance Policy Cash Value [WU]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Met Life Insurance Policy Cash Value [WU]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Suntrust Money Market - Federated Virginia Municipal		\$50,001 -	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cash TR SS [BA]		\$100,000			
Suntrust Mutual Fund - American Tax Exempt FD of Virginia CL C [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
TIAA CREF - Self ⇒ CREF Equity Index [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ CREF Global Equities [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ CREF Growth [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ CREF Stock [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ TIAA Cref Traditional Retirement [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ Vanguard Target 2015 Inv [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Spouse ⇒ CREF Bond Market [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Spouse ⇒ CREF Equity Index [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Spouse ⇒ CREF Money Market [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Spouse ⇒ CREF Social Choice [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
United Bank [BA]		\$250,001 - \$500,000	None		<input type="checkbox"/>
US Senate Federal Credit Union IRA Account [IH]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
US Senate Federal Credit Union Savings Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard Retirement Fund - Self ⇒ LEIDOS Closed Stock Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Retirement Fund - Self ⇒ LEIDOS Common Stock Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Retirement Fund - Self ⇒ Vanguard Inflation Protected Securities SEP [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Retirement Fund - Self ⇒ Vanguard Target 2015 Tr Sel [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Retirement Fund - Self ⇒ Vanguard Total Bond Mkt Index Inst Retirement Fund [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Wells Fargo & Company (WFC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Utilities and High Income Fund (ERH) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Zimmer Biomet Holdings, Inc. (ZBH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dominion Energy, Inc. (D) [ST] DESCRIPTION: Dividend Reinvestment	JT	06/21/2017	P	\$1,001 - \$15,000	
Dominion Energy, Inc. (D) [ST]	JT	09/20/2017	P	\$1,001 - \$15,000	
Dominion Energy, Inc. (D) [ST]		12/20/2017	P	\$1,001 - \$15,000	
Dominion Resources, Inc. (D) [ST] DESCRIPTION: Dividend Reinvestment	JT	03/22/2017	P	\$1,001 - \$15,000	

\* 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
Long & Foster Tysons	Spouse Salary	N/A
PJZ12	Spouse Salary	N/A
Fairfax County Retirement Fund Employee Plan BG - not self-directed	Required Benefit Distribution	\$16,514.40

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	Spring 2006	Mortgage on Primary Residence	\$250,001 - \$500,000
	Navient (formerly Sallie Mae)	2009	Student Loan	\$15,001 - \$50,000
	Nelnet	2010	Student Loan	\$15,001 - \$50,000
	Nelnet	2011	Student Loan	\$15,001 - \$50,000
	Nelnet	2012	Student Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
1995	Fairfax County Retirement Fund Employee Plan B	Defined benefit plan managed entirely by the county

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Aspen Institute	04/8/2017	04/15/2017	Washington, DC - Tokyo, Japan - Seoul, Korea - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
British Embassy	08/6/2017	08/11/2017	Washington , DC - London, England - Gibraltar (British Overseas Territory) - London, England - Boston, MA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Merrill Lynch IRA (Owner: SP)
- TIAA CREF - Self
- TIAA CREF - Spouse (Owner: SP)
- Vanguard Retirement Fund - Self

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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:** Hon. Gerald E. Connolly , 05/14/2018