



Filing ID #10026476

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Marie Newman  
**Status:** Congressional Candidate  
**State/District:** IL03

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 08/13/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Artisan International Fund Investor Class [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Berkshire Hathaway Inc. New (BRK.B) [ST]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
BMO Harris Checking Account [BA]	DC	\$1 - \$1,000	None		
BMO Harris Everyday Checking Account [BA]	DC	\$1,001 - \$15,000	None		
BMO Harris Everyday Checking Account [BA]		\$1,001 - \$15,000	None		
BMO Harris Interest Gold Checking Account [BA]	SP	\$15,001 - \$50,000	None		
BMO Harris Portfolio Checking Account [BA]	SP	\$15,001 - \$50,000	None		
BMO Harris Savings Account [BA]	DC	\$1,001 - \$15,000	None		
Cash [IH]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Cash [IH] DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)	SP	\$1,001 - \$15,000	Tax-Deferred		
Cash [IH] DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY	SP	\$1,001 - \$15,000	Tax-Deferred		
Cash [IH] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$1,001 - \$15,000	Tax-Deferred		
Cash [IH] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$250,001 - \$500,000	Tax-Deferred		
CHWAB STRATEGI/SCHWAB FUNDAMENTAL FND [EF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$1,001 - \$15,000	Tax-Deferred		
CSRSX [MF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$15,001 - \$50,000	Tax-Deferred		
DREGX [MF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$15,001 - \$50,000	Tax-Deferred		
Energy Select Sector SPDR Fund [EF] DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER		\$1,001 - \$15,000	Tax-Deferred		
Energy Select Sector SPDR Fund [EF] DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Freedom 2030 Fund [MF] DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER		\$50,001 - \$100,000	Tax-Deferred		
Financial Select Sector SPDR Fund [EF] DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER		\$15,001 - \$50,000	Tax-Deferred		
Financial Select Sector SPDR Fund [EF] DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)	SP	\$1,001 - \$15,000	Tax-Deferred		
FNDA [EF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
FNDX [EF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$1,001 - \$15,000	Tax-Deferred		
Fundrise [RE]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
GLD [EF] DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN	JT	\$15,001 - \$50,000	None		
GLD [EF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$15,001 - \$50,000	Tax-Deferred		
Glenmede Quantitative U.S. Large Cap Growth Equity Portfolio [MF] DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN	JT	\$15,001 - \$50,000	None		
GTCSX [MF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$15,001 - \$50,000	Tax-Deferred		
GTLOX [MF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$15,001 - \$50,000	Tax-Deferred		
Health Care Select Sector SPDR Fund [EF] DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)	SP	\$1,001 - \$15,000	Tax-Deferred		
HLMNX [MF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$15,001 - \$50,000	Tax-Deferred		
Hodges Small Cap Fund Retail Class [MF] DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER		\$15,001 - \$50,000	Tax-Deferred		
iShares Gold Trust [EF] DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER	SP	\$1,001 - \$15,000	Tax-Deferred		
iShares MSCI EAFE Small-Cap ETF [EF] DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER		\$15,001 - \$50,000	Tax-Deferred		
iShares Select Dividend ETF [EF] DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
iShares U.S. Pharmaceuticals ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Lending Club [OT]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Peer to peer lending					
Northwestern Mutual Life Insurance [WU]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: James Newman Extra Ordinary Life					
Northwestern Mutual Life Insurance [WU]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: James Newman Extra Ordinary Life					
Northwestern Mutual Life Insurance [WU]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: James Newman Whole Life					
Northwestern Mutual Life Insurance [WU]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: James Newman Whole Life					
Northwestern Mutual Life Insurance [WU]		\$100,001 - \$250,000	None		
DESCRIPTION: Marie Newman Adjustable CompLife					
OAKIX [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
PowerShares QQQ Trust, Series 1 [EF]	SP	\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
PowerShares QQQ Trust, Series 1 [EF]	JT	\$50,001 - \$100,000	None		
DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN					
Prosper [OT]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
DESCRIPTION: Peer to peer lending					
SCHA [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SCHB [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SCHC [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SCHF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SCHP [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SCHR [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Schwab Fundamental Emerging Markets Large Company Index ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY					
Schwab Fundamental International Large Company Index ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY					
Schwab Fundamental U.S. Large Company Index ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY					
Schwab Fundamental U.S. Small Company Index ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY					
Schwab Intermediate-Term U.S. Treasury ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY					
Schwab International Equity ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY					
Schwab S&P 500 Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
SCHWAB STRATEGI/EMERGING MKTS EQUIT [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SCHWAB STRATEGI/SCHWAB FUNDAMENTAL [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Schwab STRATEGI/Schwab FUNDAMENTAL [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Schwab STRATEGI/US REIT ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Schwab U.S. Broad Market ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)					
Schwab U.S. Large-Cap ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY					
Schwab U.S. REIT ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)					
Schwab U.S. Small-Cap ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY					
SCHX [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SHRAX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SPDR Bloomberg Barclays Emerging Markets Local Bond ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SPDR S&P 500 ETF [EF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
SPIB [EF]	SP	\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SPY [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
SPYD [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
The Consumer Staples Select Sector SPDR Fund [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN					
The Real Estate Select Sector SPDR Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
TIIRX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Utilities Select Sector SPDR Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Vanguard Communication Services ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Vanguard Equity-Income Fund Admiral Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Vanguard Global ex-U.S. Real Estate ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Vanguard Mortgage-Backed Securities ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Vanguard Mortgage-Backed Securities ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA CONTRIBUTORY					
Vanguard Small-Cap Index Fund [EF]	JT	\$15,001 - \$50,000	None		
DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN					
VEIRX [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
VQNPX [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
VYM [EF]	JT	\$15,001 - \$50,000	Capital Gains	None	\$15,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN					\$50,000
XHB [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
XLE [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
XLF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
XLP [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
XLRE [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
XLV [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Xtrackers International Real Estate ETF [EF]	SP	\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Xtrackers USD High Yield Corporate Bond ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					

\* 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
Marie K Newman Consulting	Consulting	\$.00	\$42,022.00
Figo Pet Insurance	Spouse salary	N/A	N/A

**SCHEDULE D: LIABILITIES**



Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Charles Schwab Bank	2010	Home Mortgage, La Grange, IL	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

None disclosed.

## 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
Movéo (Chicago, IL, US)	Marketing consulting
Plan B Advertising (Chicago, IL, US)	Marketing consulting
Duesbury Consulting Group (Chicago, IL, US)	Marketing consulting
Queue Marketing (Chicago, IL, US)	Marketing consulting
Culture 22 (Schaumburg, IL, US)	Marketing consulting

## 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:** Marie Newman , 08/13/2019