



Filing ID #10011284

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Brian Kelsey
Status: Congressional Candidate
State/District: TN08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2016
Filing Date: 05/14/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allianz NFJ Large Cap Value Instl		\$1,001 - \$15,000	Tax-Deferred		
American Funds EuroPacific Growth Fund		\$1,001 - \$15,000	Tax-Deferred		
American Funds SMALLCAP World Fund		\$1,001 - \$15,000	Tax-Deferred		
American Funds The Growth Fund of America		\$1,001 - \$15,000	Tax-Deferred		
American Funds The Income Fund of America		\$1,001 - \$15,000	Tax-Deferred		
American Funds Washington Mutual Investors Fund		\$1,001 - \$15,000	Tax-Deferred		
Brown Capital Mgmt Small Co Inv		\$1,001 - \$15,000	Tax-Deferred		
Fidelity International Discovery		\$1,001 - \$15,000	Tax-Deferred		
Metropolitan Bank Checking Account		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
The Kelsey Firm, PLLC		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Collierville / Shelby, TN, US DESCRIPTION: Law Firm					
Triumph Bank Wealth Money Market Account		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Vanguard 500 Index Fund Admiral Shares		\$15,001 - \$50,000	Tax-Deferred		
Vanguard Global Equity Fund		\$15,001 - \$50,000	Tax-Deferred		
Vanguard GNMA Fund Investor Shares		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Institutional Index I		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Intermediate-Term Bond Index Fund Investor		\$1,001 - \$15,000	Tax-Deferred		
Vanguard REIT Index Fund Admiral Shares		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Short-Term Bond Index Fund Investor Shares		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Small-Cap Index Fund Admiral Shares		\$15,001 - \$50,000	Tax-Deferred		
Vanguard Total Bond Market Index I		\$15,001 - \$50,000	Tax-Deferred		
Vanguard Windsor Fund Investor Shares		\$15,001 - \$50,000	Tax-Deferred		

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
State of Tennessee	Salary	\$10,142.00	\$30,428.00
The Kelsey Firm, PLLC	Salary	\$7,296.00	\$23,540.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Crosscountry Mortgage, Inc.	June 2014	Home Mortgage, Germantown, TN	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member-Manager	The Kelsey Firm, PLLC
Trustee	The Richard L. Carrington Land Trust
Volunteer Board Member	Tennessee YMCA Center for Civic Engagement

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2004	Brian Kelsey and the State of Tennessee	401(k) retirement plan
November 2004	Brian Kelsey and the State of Tennessee	Defined Benefit Pension Plan
November 2004	Brian Kelsey and the State of Tennessee	Health Insurance Plan
November 2004	Brian Kelsey and the State of Tennessee	Life Insurance Plan

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

Source (Name and Address)	Brief Description of Duties
Confidential (Collierville, TN, US)	Confidential

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: Brian Kelsey , 05/14/2016