



Filing ID #10009679

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Joseph Montes
Status: Congressional Candidate
State/District: CA01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2016
Filing Date: 02/29/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
240 Estates Drive Private Note	JT	Over \$50,000,000	Interest	\$2,501 - \$5,000	None
DESCRIPTION: My wife and provided a private interest-only note in the amount of \$190,000 to a home buyer which is secured against the property.					
2405 E. 17th Rental Home	JT	Over \$50,000,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
LOCATION: Spokane, WA, US					
282 Convair Partnership - Life Estate Interest	JT	Undetermined	Life Estate Proceeds	\$5,001 - \$15,000	\$50,001 - \$100,000
LOCATION: Chico, CA, US					
William Tell Apartments		\$1,001 - \$15,000	Rent	None	None
LOCATION: Chico, CA, US					

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
AAA Properties	Salary and bonuses	\$20,833.33	\$140,000

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Nationstar Mortgage	July 2011	This is the mortgage payment on our home in Spokane Washington that is currently a rental	\$100,001 - \$250,000
	Golden 1 Credit Union	September 2015	It was a new car loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Stairways Programming
Board Member	Downtown Chico Business Association (DCBA)
Founding Member	Chico Youth Court
Chico Parking Committee Member	City of Chico - Parking Action Resource Committee (advisory committee)
At-Large Committee Member	Butte County Central Committee (County Republican Party)

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2014	Wayne A. Cook (Employer) and Joseph P. Montes	This is an employment agreement which specifies the compensation and term of my employment. It provides that I may suspend my employment to pursue public service and that after such service (or failed attempt to secure office) I can return to my pre-suspension status with respect to salary, bonuses, and benefits.

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

None disclosed.

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: Joseph Montes , 02/29/2016