



Filing ID #10015750

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Roger Dean Huffstetler  
**Status:** Congressional Candidate  
**State/District:** VA05

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 08/6/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Fund ⇒ AMCAP Fund		\$1 - \$1,000	Tax-Deferred		
American Fund ⇒ American Balanced Fund		\$1,001 - \$15,000	Tax-Deferred		
American Fund ⇒ Capital Income Builder		\$1,001 - \$15,000	Tax-Deferred		
American Fund ⇒ Capital World Growth and Income Fund		\$1 - \$1,000	Tax-Deferred		
American Fund ⇒ New World Fund		\$1 - \$1,000	Tax-Deferred		
American Fund ⇒ SMALLCAP World Fund		\$1 - \$1,000	Tax-Deferred		
Capitol One 360		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Charles Schwab ⇒ JP Morgan SmartRetirement Blend 2045		\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Condominium		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Washington, DC, US					
Northwest Mutual Brokerage Account ⇒ Global Balance Fund		\$1,001 - \$15,000	Tax-Deferred		
Northwest Mutual Whole Life Insurance		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Northwestern Investment Management Services ⇒ Commodity Index		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Investment Management Services ⇒ General CA Muni Class A		\$1 - \$1,000	Tax-Deferred		
Northwestern Investment Management Services ⇒ I shares Investment grade corporate Bond		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Investment Management Services ⇒ Ishares Core S&P Small Cap		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Investment Management Services ⇒ IsharesTR core S&P Mid-Cap ETF		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Investment Management Services ⇒ S&P 500 ETF		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Investment Management Services ⇒ Vanguard Developed Markets ETF		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Investment Management Services ⇒ Vanguard Index Total Bond		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Investment Management Services ⇒ Vanguard International Equity Index		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Northwestern Investment Management Services ⇒ Vanguard REIT ETF		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Investment Management Services ⇒ Vanguard short term bond		\$1,001 - \$15,000	Tax-Deferred		
Twilio Inc. Class A (TWLO)		\$50,001 - \$100,000	Capital Gains	\$15,001 - \$50,000	\$15,001 - \$50,000

\* Asset class details available at the bottom of this form.

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Jefferson OB/GYN	Spouse salary	N/A	N/A
Trinity Health	Spouse Salary	N/A	N/A

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Mohela	March 2003	Student Loans	\$50,001 - \$100,000
SP	Navient	June 2006	Student Loans	\$15,001 - \$50,000
	Wells Fargo	October 2015	Mortgage on Washington, DC Condo	\$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**

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- American Fund
- Charles Schwab
- Northwest Mutual Brokerage Account
- Northwestern Investment Management Services

## 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:** Roger Dean Huffstetler , 08/6/2017