



Filing ID #10010915

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Bob Poe
Status: Congressional Candidate
State/District: FL10

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2016
Filing Date: 05/13/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America Checking		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Bank of America Checking Account		\$1,001 - \$15,000	None		
Robert J. Poe Revocable Trust ⇒ 2207 Bowmont Dr		\$5,000,001 - \$25,000,000	None		
LOCATION: Beverly Hills, CA, US					
Robert J. Poe Revocable Trust ⇒ 71 Interlaken Road		\$500,001 - \$1,000,000	None		
LOCATION: Orlando, FL, US					
Robert J. Poe Revocable Trust ⇒ Alliance Bernstein Stocks		\$5,000,001 - \$25,000,000	Capital Gains	\$50,001 - \$100,000	\$50,001 - \$100,000
Robert J. Poe Revocable Trust ⇒ Alliance Berstein		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
DESCRIPTION: These are bonds held in the Alliance Berstein L.P. account.					
Robert J. Poe Revocable Trust ⇒ Alliance Berstein Cash Balance		\$1,000,001 - \$5,000,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Robert J. Poe Revocable Trust ⇒ Alliance Bernstein Hedge Fund		\$500,001 - \$1,000,000	Capital Gains	None	None
Robert J. Poe Revocable Trust ⇒ Alliance Bernstein Mutual Funds		\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Robert J. Poe Revocable Trust ⇒ AllianceBernstein European Opportunities Series, 1% Interest		\$250,001 - \$500,000	Dividends, IRC Sec 988 Income	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: New York, NY, US DESCRIPTION: Less than 1% partner receiving dividends and other portfolio income.					
Robert J. Poe Revocable Trust ⇒ Bernstein Alternative Investment Strategies, LLC		\$500,001 - \$1,000,000	Capital Gains, Dividends, Interest, Ordinary Business Income, Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: New York, NY, US DESCRIPTION: Less than 1% limited partner in investment.					
Robert J. Poe Revocable Trust ⇒ Penta Mezzanine SBIC Fund		\$100,001 - \$250,000	Ordinary Business Income	\$1 - \$200	\$1 - \$200
LOCATION: Orlando, FL, US DESCRIPTION: Less than 1% partner in this partnership.					

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

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Fifth-Third Bank	October 2013	Auto Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Bob Poe Charitable Foundation

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Robert J. Poe Revocable Trust

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: Bob Poe , 05/13/2016