



Filing ID #10018397

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** John Bartlett  
**Status:** Congressional Candidate  
**State/District:** NJ11

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 11/5/2017  
**Period Covered:** 01/01/2016– 10/31/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Investments ⇒ Fidelity FMMT RET GOV MM		\$1,001 - \$15,000	Tax-Deferred		
Legg Mason ⇒ Clearbridge Small Cap Fund Class A		\$15,001 - \$50,000	Tax-Deferred		
Legg Mason ⇒ LeggMason Opportunity Trust Class A		\$15,001 - \$50,000	Tax-Deferred		
NJ BEST 529 Plan - Franklin Growth Allocation 529 Portfolio - Class Direct  LOCATION: NJ	DC	\$100,001 - \$250,000	Tax-Deferred		
NJ DCRP ⇒ QMA Mid Cap Quantitative Core Equity Fund		\$1,001 - \$15,000	Tax-Deferred		
NJ DCRP ⇒ Vanguard Institutional Index Fund (Institutional Shares)		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Brokerage ⇒ Alibaba Group Holding Limited American Depositary Shares each representing one Ordinary share (BABA)		\$1,001 - \$15,000	None		
Schwab Brokerage ⇒ Amazon.com, Inc. (AMZN)		\$1,001 - \$15,000	None		
Schwab Brokerage ⇒ Universal Display Corporation (OLED)		\$1,001 - \$15,000	None		
Schwab Brokerage (Spouse) ⇒ Cash & Money Market	SP	\$15,001 - \$50,000	None		
Schwab Investor Checking	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Roth IRA (Spouse) ⇒ Cash	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA (Spouse) ⇒ Schwab S&P 500 Index Fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA (Spouse) ⇒ Schwab US Broad Market ETF	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA (Spouse) ⇒ Schwab US Dividend Equity ETF	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA (Spouse) ⇒ Scout Intl Fund	SP	\$15,001 - \$50,000	Tax-Deferred		
TIAA-CREF (Spouse) ⇒ CREF Global Equities R2	SP	\$15,001 - \$50,000	Tax-Deferred		
TIAA-CREF (Spouse) ⇒ CREF Growth R2	SP	\$50,001 - \$100,000	Tax-Deferred		
TIAA-CREF (Spouse) ⇒ CREF Stock R2	SP	\$15,001 - \$50,000	Tax-Deferred		
TIAA-CREF (Spouse) ⇒ MainStay Large Cap Growth I	SP	\$15,001 - \$50,000	Tax-Deferred		
TIAA-CREF (Spouse) ⇒ T. Rowe Price Ret 2035 Fund	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TIAA-CREF (Spouse) ⇒ TIAA Real Estate	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard 401(k) ⇒ American Growth Funds R-4		\$15,001 - \$50,000	Tax-Deferred		
Vanguard 401(k) ⇒ Vanguard 500 Index Fund		\$50,001 - \$100,000	Tax-Deferred		
Vanguard Total Stock Market Index Fund, Admiral Shares	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
County Of Passaic	Salary	\$23,750.00	\$28,500.00
Law Offices of John W. Bartlett LLC	Gross Business Income	\$10,000.00	\$45,000.00
Fairleigh Dickinson University	Spouse Salary	N/A	N/A
Friends Seminary	Spouse Honorarium	\$.00	\$1,000.00
Claremont School of Theology	Spouse Honorarium	\$750.00	\$750.00
Educational Resource Group LLC	Gross Business Income	\$19,404.00	\$13,207.00
Educational Resource Group LLC	Spouse Gross Business Income	N/A	N/A
Murphy Orlando LLC	Compensation For Services	\$74,726.00	\$38,323.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Home Mortgage	June 2007	Mortgage on Personal Residence	\$500,001 - \$1,000,000
JT	American Education Services	December 2005	Consolidated Student Loans	\$15,001 - \$50,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Acura Financial Services	December 2016	Car Loan	\$15,001 - \$50,000
	Toyota Financial Services	August 2016	Car Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner	Law Offices of John W. Bartlett LLC
Partner	Murphy Orlando LLC
Member	Educational Resource Group LLC
Trustee	Friends Of Passaic County Parks, Inc.
Freeholder	Board of Chosen Freeholders, County of Passaic, New Jersey
COMMENTS: elected public office	

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>Fidelity Investments DESCRIPTION: Fidelity Advisor Automatic (deminimis) Rollover Accounts</li><li>Legg Mason DESCRIPTION: IRA at Legg Mason</li><li>NJ DCRP DESCRIPTION: New Jersey Defined Contribution Retirement Program</li><li>Schwab Brokerage (100% Interest) LOCATION: US DESCRIPTION: Schwab Brokerage Account</li><li>Schwab Brokerage (Spouse) (Owner: SP) LOCATION: US DESCRIPTION: Schwab Brokerage Account - Spouse</li><li>Schwab Roth IRA (Spouse) (Owner: SP) DESCRIPTION: Spouse's Roth IRA at Charles Schwab</li><li>TIAA-CREF (Spouse) (Owner: SP)</li><li>Vanguard 401(k) DESCRIPTION: Vanguard 401(k)</li></ul>
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## 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:** John Bartlett , 11/5/2017