



Filing ID #10032262

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Robbie Goldstein
Status: Congressional Candidate
State/District: MA08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 12/14/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Express Personal Savings Account [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Capital One Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity Freedom 2050 FD [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Freedom 2050 FD [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Home [RP] LOCATION: Boston, MA, US	JT	\$250,001 - \$500,000	None		
Home Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
IQVIA Holdings, Inc. (IQV) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
MGH Academic Annuity [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MGH TSA [MF]		\$15,001 - \$50,000	Tax-Deferred		
Mortgage Checking [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Investment Accounts ⇒ Apple Inc. (AAPL) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Accounts ⇒ Schwab Intelligent Portfolio Contributory IRA [EF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Stanton Schwartz Design Group, LLC, 50% Interest [OL]	SP	\$50,001 - \$100,000	None		
LOCATION: Boston, MA, US DESCRIPTION: Design firm owned jointly between Ryan Stanton and Jessica Schwartz. Income from the business is paid to each as salary and reported separately. Value of the business is from 2018 Federal Tax Return and reflects assets held.					

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Partners HealthCare / MGPO	Salary	\$165,564.00	\$141,624.94
Stanton Schwartz Design Group, LLC	Spouse Salary	\$45,000.00	\$42,415.00
EBSCO Industries Inc	Consulting Services	N/A	\$1,500.00
Community Research Initiative	Consulting Services	N/A	\$628.88
Advance Medicine, Inc.	Consulting Services	\$1,500.00	\$1,500.00

SCHEDULE D: LIABILITIES

None disclosed.

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

- Schwab Investment Accounts (Owner: JT)
DESCRIPTION: Schwab Investment Accounts

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: Robbie Goldstein , 12/14/2019