



Filing ID #10018052

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Courtney Tritch  
**Status:** Congressional Candidate  
**State/District:** IN03

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 07/11/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual TOD ⇒ Carter Validus MC 1		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual TOD ⇒ Carter Validus MC 2		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Individual TOD ⇒ FS Investment Corp 2		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual TOD ⇒ Hines Global REIT		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Individual TOD ⇒ Hines Global REIT 2		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
JP Morgan Chase Estate		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
JP Morgan Chase Personal		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ American Funds 2045 Target Date-A		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ American Funds Capital Income Builder C		\$1 - \$1,000	Tax-Deferred		
Roth IRA ⇒ American Funds Capital Income Builder F		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ American Funds Growth Fund of America C		\$1 - \$1,000	Tax-Deferred		
Roth IRA ⇒ American Funds Growth Fund of America F		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ American Funds Investment Company of America C		\$1 - \$1,000	Tax-Deferred		
Roth IRA ⇒ American Funds Investment Company of America F		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ MFS Growth Allocation A		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA ⇒ MFS Growth Allocation B		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA ⇒ MFS Growth Allocation C		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ American Funds Capital Income Builder F		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ American Funds Growth Fund of America F		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ American Funds Income Fund of America F		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Archer-Daniels-Midland Company (ADM)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Assurant, Inc. (AIZ)		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Traditional IRA ⇒ Broadcom Corporation - Class A (BRCM)		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Dodge & Cox International Stock		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Facebook, Inc. - Class A (FB)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Fiserv, Inc. (FISV)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Johnson Controls International plc Ordinary Share (JCI)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Lockheed Martin Corporation (LMT)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Masco Corporation (MAS)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ McDonald's Corporation (MCD)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ MFS Diversified Income Fund I		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ MFS International Diversification A		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Mondelez International, Inc. - Class A (MDLZ)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Monster Beverage Corporation (MNST)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Nike, Inc. (NKE)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
NVIDIA Corporation (NVDA)					
Traditional IRA ⇒ ONEOK Partners, L.P. (OKS)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Ryder System, Inc. (R)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Sierra Income Corp		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ SunAmerica Brokerage Money Market		\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA ⇒ SunAmerica Specialty Income Explorer W		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Sysco Corporation (SYY)		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Target Corporation (TGT)		\$1,001 - \$15,000	Tax-Deferred		

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Northeast Indiana Regional Partnership	salary	N/A	\$62,062.70
Courtney Tritch Consulting	consulting fee	\$1,450.00	\$1,360.00
Inherited IRA	IRA distribution	\$11,800.00	\$1,894.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner/Sole Proprietor	Courtney Tritch Consulting

Position	Name of Organization
Co-Trustee	Daniel L Tritch Family Trust
Co-Executor/Personal Representative	Estate of Jennifer Tritch

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Individual TOD  
LOCATION: US
- Roth IRA
- Traditional IRA

## 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:** Courtney Tritch , 07/11/2017