



Filing ID #10029259

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Lucia Kay McBath  
**Status:** Congressional Candidate  
**State/District:** GA06

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2018  
**Filing Date:** 08/26/2019  
**Period Covered:** 01/01/2017– 05/10/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AT&T Inc. (T) [ST]	SP	\$1 - \$1,000	Dividends	None	\$1 - \$200
BMW [RP] LOCATION: Rockford/Blount, TN, US	SP	\$15,001 - \$50,000	None		
Cambiar Global Ultra Focus [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Delta Pension ⇒ iShares 7 - 10 Year Treasury Bond ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
Delta Pension ⇒ iShares Core US Aggregate Bond EFT [MF]		\$1,001 - \$15,000	Tax-Deferred		
Delta Pension ⇒ iShares MSCI EAFE Small Cap ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
Delta Pension ⇒ iShares Russell 2000 ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Delta Pension ⇒ SPDR S&P 500 ETF [MF]		\$50,001 - \$100,000	Tax-Deferred		
Delta Pension ⇒ SPDR S&P Mid Cap 400 ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		
Delta Pension ⇒ Vanguard FTSE Developed Markets ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
Delta Pension ⇒ Vanguard Intermediate Term Corp Bond ETF [MF]		\$50,001 - \$100,000	Tax-Deferred		
Deutsche X Trackers MSCO EAFE Hedged Equity FTF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Exxon Mobil Corporation (XOM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Fidelity Contra Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Fidelity Contra Fund Comingled Pool [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Fidelity Extended Market Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity International Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Large Cap Growth [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
Fidelity S&P 500 Index Fund [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
Fidelity Small Cap Discovery [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
Fidelity Small/Mid Cap Index Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Fidelity Small/Mid Growth Index Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Fidelity Total Market Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity US Bond Index Fund [MF]	SP	\$1 - \$1,000	Tax-Deferred		
GMC Envoy [RP]	SP	\$1,001 - \$15,000	None		
LOCATION: Rockford/Blount County, TN, US					
Inspirity [IH]		\$15,001 - \$50,000	Tax-Deferred		
Walthausen Small Cap Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000

\* 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
Everytown for Gun Safety Action Fund	Salary	\$25,000.00	\$100,000.00
Simon & Schuster	Book Contract	\$23,250.00	\$23,250.00
Marti Nokon	Film Consultation		\$5,000.00
Delta Airlines	Pension	\$9,000.00	\$18,000.00
Delta Sigma Theta Sorority	Speaking Fee	\$.00	\$1,050.00
Charisma Speakers	Speaking Fee	\$.00	\$900.00
Public Allies	Speaking Fee	N/A	\$2,400.00
Center for Civil & Human Rights	Speaking Fee	N/A	\$3,200.00
Robinson Agency	Speaking Fee	N/A	\$11,000.00
Massachussetts Office of Victim Assistance	Speaking Fee	\$5,000.00	N/A
University of Akron	Speaking Fee	\$1,500.00	N/A
Delta Airlines	Spouse Salary	\$36,000.00	\$88,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	American Express	June 2017	Credit Card	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Founder	Champion in the Making Legacy Foundation

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
April 2018	Everytown for Gun Safety Action Fund	I took a leave of absence from organization and will only return after elections have been completed in 11/15/2018.
August 1984	Delta and Congresswoman McBath	Employee Pension

## 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>Delta Pension</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:** Hon. Lucia Kay McBath , 08/26/2019