



Filing ID #10021295

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Scott Perry  
**Status:** Member  
**State/District:** PA04

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2017  
**Filing Date:** 05/7/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Aegis Therapies 401(k) - Mercer [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ Capital Income Builder-A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ Capital World Growth & Income Fund-A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ Smallcap World Fund-A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ The Bond Fund of America-A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LPL Financial ⇒ American Balanced Cl A [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
LPL Financial ⇒ Insured Cash Account [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Members First Credit Union [BA]		\$50,001 -	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$100,000			
Northwestern Mutual [WU]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Pennsylvania 529 Guaranteed Savings Plan - Mattea [5P] LOCATION: PA		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Pennsylvania 529 Guaranteed Savings Plan - Ryenn [5P] LOCATION: PA		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Pennsylvania State Employees Credit Union [BA]	SP	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
Residential Rental - Dillsburg, PA [RP] LOCATION: Dillsburg/Cumberland, PA, US		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Residential Rental - Harrisburg, PA [RP] LOCATION: Harrisburg/Dauphin, PA, US		\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
State Farm Bank CDs [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard ⇒ 500 Index Fund Adm [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ LifeStrategy Mod Growth [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ Total Stock Mkt Idx Adm [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ US Growth Fund Investor [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

\* 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 B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Aegis Therapies Inc	spousal salary	N/A
Pennsylvania State Employees' Retirement System	state retirement	\$14,397.84
Doterra International LLC	spouse business income	\$2,965.86

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Seterus Inc	November 2003	Mortgage on Residential Rental - Harrisburg, PA	\$50,001 - \$100,000
	Suntrust Mortgage	January 2001	Mortgage on Residential Rental - Dillsburg, PA	\$50,001 - \$100,000
	Members First Federal Credit Union	September 2010	Mortgage on Personal Residence	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2013	Scott Perry and Pennsylvania State Employee Retirement System	Continued participation in the Pennsylvania State Employee Retirement System.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>American Funds (Owner: SP)</li><li>LPL Financial</li></ul>
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- Vanguard (Owner: SP)

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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. Scott Perry , 05/7/2018