



Filing ID #10019071

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Lauren Elizabeth Baer  
**Status:** Congressional Candidate  
**State/District:** FL18

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 01/10/2018  
**Period Covered:** 01/01/2016– 12/31/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ally Bank Account	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Citibank Accounts	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Citibank IRA ⇒ AB GLOBAL BOND FUND ADVISOR CLASS (ANAYX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ BARON EMERGING MARKETS FUND INSTITUTIONAL CLASS (BEXIX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ BROWN ADVISORY SMALL-CAP FUNDAMENTAL VALUE FUND INVESTOR CLASS (BIAUX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ COLUMBIA SELECT LARGE-CAP VALUE FUND ADVISOR CLASS (CSERX)	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Citibank IRA ⇒ DREYFUS/ STANDISH GLOBAL FIXED INCOME FUND CLASS I (SDGIX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ EATON VANCE FLOATING RATE FUND (INSTITUTIONAL SHARES) (EIBLX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ GOLDMAN SACHS EMERGING MARKETS EQUITY INSIGHTS FD CLASS I (GERIX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ GUGGENHEIM TOTAL RETURN BOND FUND INSTITUTIONAL CLASS (GIBIX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ ISHARES TR MSCI USA MINIMUM VOLATILITY ETF (USMV)	SP	\$15,001 - \$50,000	Tax-Deferred		
Citibank IRA ⇒ ISHARES TR RUSSELL 1000 VALUE ETF (IWD)	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ MFS INTERNATIONAL EQUITY FUND CLASS I (MIEIX)	SP	\$15,001 - \$50,000	Tax-Deferred		
Citibank IRA ⇒ T ROWE PRICE BLUE CHIP GROWTH (TRBCX)	SP	\$15,001 - \$50,000	Tax-Deferred		
Citibank IRA ⇒ THE HARTFORD INTERNATIONAL VALUE FUND CLASS I (HILIX)	SP	\$15,001 - \$50,000	Tax-Deferred		
Citibank IRA ⇒ WESTERN ASSET CORE PLUS BOND FUND CLASS I (WACPX)	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ WESTERN ASSET INSTL GOVT MONEY MARKET (WAGI)	SP	\$1,001 - \$15,000	Tax-Deferred		
Gretna Realty Associates, LLC ⇒ Westside Center South		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Gretna, LA, US					
DESCRIPTION: 00.49% ownership interest in commercial property in Gretna, LA.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Cherry Tree Investors, LLC ⇒ Cherry Tree Plaza					
		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Washington, IL, US DESCRIPTION: 2.12% ownership interest in commercial property in Washington, IL.					
Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Highland Square Investors, LLC ⇒ Highland Square Shopping Center					
		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	None
LOCATION: Jacksonville, FL, US DESCRIPTION: 00.49% ownership interest in commercial property in Jacksonville, FL.					
Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Satilla Square Investors, LLC ⇒ Satilla Square					
		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Waycross, GA, US DESCRIPTION: 1.34% ownership interest in commercial property in Waycross, GA.					
Marjorie B. Baer Irrevocable Grandchildren's Trust ⇒ John Hancock Universal Life Insurance Policy					
		\$500,001 - \$1,000,000	None		
Meyers-Baer 2016 Long Term Trust ⇒ Highland Square Investors, LLC ⇒ Highland Square Shopping Center					
	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	None
LOCATION: Jacksonville, FL, US DESCRIPTION: 00.36% ownership interest in commercial property in Jacksonville, FL.					
Morgan Stanley Brokerage Account ⇒ BANK HAPOALIM CD NEW YORK CITYNY CD					
		\$50,001 - \$100,000	Interest	None	None
Morgan Stanley Brokerage Account ⇒ DISCOVER BK GREEN GREENWOOD DECD					
		\$50,001 - \$100,000	Interest	None	None
Morgan Stanley Brokerage Account ⇒ Morgan Stanley Bank Deposit Program					
		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Cash deposits.					
Morgan Stanley Brokerage Account ⇒ MORRILL & JAMES MERRIAM KS CD					
		\$1,001 - \$15,000	Interest	None	None
Morgan Stanley Brokerage Account ⇒ washington fed SEATTLE WA CD					
		\$50,001 - \$100,000	Interest	\$201 - \$1,000	None
Morgan Stanley Brokerage Account ⇒					
		None	Interest	\$201 -	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Whitney Bank Gulfport MS CD				\$1,000	
COMMENTS: CD matured and redeemed on 11/14/17.					
Morgan Stanley IRA ⇒ CAUSEWAY INTL VALUE INSTL (CIVIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ COLUMBIA SELECT LG CP VAL I (CSVZX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ EDGEWOOD GROWTH INSTL (EGFIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ FEDERATED INTL LEADERS IS (FGFLX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ FEDERATED KAUFMAN LG CP INSTL (KLCIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ JOHN HANCOCK DISPLND VAL INST (JVLIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Managed Investment Account ⇒ AB SMALL CAP GRW ADV (QUAYX)		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ AQR MNGD FUTURES STRAT I (AQMIX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ ARTISAN INTERNATIONAL ADV (APDIX)		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ BLACKROCK HI YIELD BD PTF INST (BHYIX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ CAUSEWAY INTL VALUE INSTL (CIVIX)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ CENTER COAST MLP FOCUS I (CCCNX)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ CLEARBRIDGE LARGE CAP GWTH I (SBLYX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒		\$1,001 - \$15,000	Capital Gains,	\$201 -	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COLUMBIA SELECT LG CP VAL I (CSVZX)			Dividends	\$1,000	\$1,000
Morgan Stanley Managed Investment Account ⇒ GOLDMAN SACHS ABSLT RET TRCK I (GJRTX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ Goldman Sachs GRW OPPORT I (GGOIX)		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ ISHARES CORE US AGGREGATE (AGG)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ ISHARES RUSSELL MIDCAP G ETF (IWP)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ ISHARES TIPS BOND ETF (TIP)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ JOHN HANCOCK DISPLND VAL INST (JVLIX)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ JPMORGAN US LG CP CORE PLS I (JLPSX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ LAZARD EMERGING MKTS EQ I (LZEMX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ PIMCO ENHANCED SHRT MTRT EXC (MINT)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ POLEN GROWTH INSTITUTIONAL (POLIX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ POWERSHARES RUSSELL MIDCAP P (PXMV)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ PRINCIPAL SM MDCP DIV INC I (PMDIX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	None
Morgan Stanley Managed Investment Account ⇒ PRINCIPAL SM MDCP DIV INC P (PMDPX)		None	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ VIRTUS NWFLT MLTSEC SHTM BD I (PIMSX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

<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>
Morgan Stanley Managed Investment Account ⇒ VIRTUS VONTOBEL EMRG MKT OPP I (HIEMX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ WELLS FARGO SPECIAL MDCP VL I (WFMIX)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ XTRACKERS MSCI JAPAN HEDGED EQ (DBJP)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Roth IRA ⇒ AB SMALL CAP GRW ADV (QUAYX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ ALERIAN MLP ETF (AMLP)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ AMER CENT EMERG MKTS I (AMKIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ AMG TIMESSQ MID CAP GW Z (TMDIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ AQR MNGD FUTURES STRAT I (AQMIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ CAUSEWAY INTL VALUE INSTL (CIVIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ COLUMBIA SELECT LG CP VAL I (CSVZX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ EDGEWOOD GROWTH INSTL (EGFIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ FEDERATED INTL LEADERS IS (FGFLX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ FEDERATED KAUFMAN LG CP INSTL (KLCIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ GOLDMAN SACHS ABSLT RET TRCK I (GJRTX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
GOLDMAN SACHS GRW OPPORT I (GGOIX)					
Morgan Stanley Roth IRA ⇒ HARDING LOEVNER EMERG MKTS ADV (HLEMX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ JOHN HANCOCK DISPLND VAL INST (JVLIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ JPMORGAN US LG CP CORE PLS I (JLPSX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ MAINSTAY LARGE CAP GRW I (MLAIX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ POWERSHARES RUSSELL MIDCAP P (PXMV)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ TOUCHSTONE MID CAP VALUE Y (TCVYX)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ VANGUARD SM CAP VALUE ETF (VBR)		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ XTRACKERS MSCI JAPAN HEDGED EQ (DBJP)		\$1,001 - \$15,000	Tax-Deferred		
WeWork 401K ⇒ N/A	SP	\$15,001 - \$50,000	Tax-Deferred		
WeWork Stock Options	SP	Undetermined	Ordinary Income	\$15,001 - \$50,000	None
DESCRIPTION: Options to purchase stock in WeWork, a privately held company. These options are not part of an ESOP. The options have an expiration date of February 3, 2026.					

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

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount Current Year to Filing	Amount Preceding Year
WeWork	Spouse Salary	N/A	N/A
U.S. Department of State	Salary	\$22,525.84	\$130,976.33

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Albright Stonebridge Group	Consulting Fees	\$25,000.00	N/A
Federal Election Commission	Spouse Salary	N/A	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Access Group Incorporated	2004-2007	Law School Loans	\$50,001 - \$100,000
COMMENTS: Loan satisfied in full January 2017.				

### SCHEDULE E: POSITIONS

Position	Name of Organization
Vice President and Member of the Board	Association of Marshall Scholars
COMMENTS: Uncompensated position in Marshall Scholar alumni association. Vice President (2015-present); Member of the Board (2009-present).	
Treasurer	Columbia Road Condominium Association
COMMENTS: Uncompensated position in residential condo association (June 2013-May 2017).	

### 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>◦ Citibank IRA (Owner: SP)</li> <li>◦ Gretna Realty Associates, LLC LOCATION: US</li> <li>◦ Lauren Elizabeth Baer 2014 Long Term Trust</li> <li>◦ Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Cherry Tree Investors, LLC LOCATION: US</li> <li>◦ Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Highland Square Investors, LLC LOCATION: US</li> <li>◦ Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Satilla Square Investors, LLC</li> </ul>
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LOCATION: US

- Marjorie B. Baer Irrevocable Grandchildren's Trust
- Meyers-Baer 2016 Long Term Trust (Owner: DC)
- Meyers-Baer 2016 Long Term Trust ⇒ Highland Square Investors, LLC (Owner: DC)  
LOCATION: US
- Morgan Stanley Brokerage Account  
LOCATION: US
- Morgan Stanley IRA
- Morgan Stanley Managed Investment Account  
LOCATION: US
- Morgan Stanley Roth IRA
- WeWork 401K (Owner: SP)

## 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:** Lauren Elizabeth Baer , 01/10/2018