



Filing ID #10014568

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Ron Estes
Status: Congressional Candidate
State/District: KS04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 03/9/2017
Period Covered: 01/01/2016– 03/12/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Hewitt/Koch 401K ⇒ Balanced Index Allocation		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Balanced index fund					
Hewitt/Koch 401K ⇒ GIC Stable Value		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Stable value fund					
Hewitt/Koch 401K ⇒ Mid-Cap Index		\$1,001 - \$15,000	Tax-Deferred		
Hewitt/Koch 401K ⇒ Target Retirement 2040		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Age based retirement account					
Hewitt/Koch 401K ⇒ Total US Aggregate Bond Market		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Bond market fund					
Hewitt/Koch 401K ⇒ US Value Index		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Intrust checking and savings	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Kansas Learning Quest ⇒ ACI - Aggressive Track Conservative Portfolio DESCRIPTION: DC2 account		\$15,001 - \$50,000	Tax-Deferred		
Kansas Learning Quest ⇒ ACI Aggressive Track Moderate Portfolio DESCRIPTION: DC3 account		\$15,001 - \$50,000	Tax-Deferred		
KPERS DESCRIPTION: Pension value is determined at retirement		Undetermined	None		
KPERS 457 ⇒ DFA US Large Cap Value 1		\$1,001 - \$15,000	Tax-Deferred		
KPERS 457 ⇒ Stable Value Fund DESCRIPTION: Stable value fund		\$50,001 - \$100,000	Tax-Deferred		
KPERS 457 ⇒ T Rowe Price Capital Appreciation DESCRIPTION: Balanced fund		\$1,001 - \$15,000	Tax-Deferred		
KPERS 457 ⇒ Vanguard Total Bond Market Index Inst DESCRIPTION: Bond fund		\$1,001 - \$15,000	Tax-Deferred		
Mid American Credit Union		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Mid American Credit Union	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ American Balanced Fund Cl F2 DESCRIPTION: Growth and income		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ American Mutual Fund Cl F2 DESCRIPTION: Growth and income		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Capital World Growth and Income fund Cl		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
F2					
DESCRIPTION: Growth and income					
Roth IRA ⇒ Investment Company of America		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Growth and Income					
Roth IRA ⇒ JP Morgan Mid Cap Value Cl L		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Growth					
Roth IRA ⇒ JPMorgan Government Bond Fund Select Class		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Income					
Roth IRA ⇒ MFS Corporate Bond Fund Cl 1		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Income					
Roth IRA ⇒ MFS New Discovery Fund Cl 1		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Growth					
Roth IRA ⇒ New Perspective Fund Cl F2		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Growth and Income					
Spouse 401k	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Nationwide 401k					
Spouse 401k	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: CUNA Mutual Group 401k					
Spouse 403b	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: The Legend Group 403b					
Spouse KPERS	SP	\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Spouse KPERS					
Spouse Roth IRA	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Spouse Roth IRA					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
State of Kansas	salary	\$16,538.05	\$86,003.06
AFP	spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
DC	Department of Education	August 2013; August 2016	Student loans	\$10,000 - \$15,000
	Citibank Mastercard	May 2016	Credit card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Trustees	Kansas Public Employee Retirement System
Board Member	Pooled Money Investment Board
Kansas State Treasurer	State of Kansas

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
April 2017	State of Kansas and myself	Participation in the pension system and the 457 plan

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">Hewitt/Koch 401KKansas Learning Quest LOCATION: KSKPERS 457Roth IRA
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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: Ron Estes , 03/9/2017