



Filing ID #10000044

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Donna McAleer
Status: Congressional Candidate
State/District: UT01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2014
Filing Date: 06/8/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Catheter Connections ⇒ Catheter Connections DESCRIPTION: Growth stock	JT	\$15,001 - \$50,000	None		
Fidelity IRA ⇒ Fidelity Contrafund		\$100,001 - \$250,000	Tax-Deferred	None	None
Fidelity IRA ⇒ Fidelity Contrafund		\$100,001 - \$250,000	Tax-Deferred	None	None
Fidelity Rollover ⇒ Fidelity Contrafund	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
Fidelity Rollover ⇒ Fidelity Equity Income	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
Fidelity Rollover ⇒ Fidelity Export & Multinational	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
Fidelity Rollover ⇒ Fidelity international Discovery	SP	\$15,001 - \$50,000	Tax-Deferred	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Rollover ⇒ Fidelity Low Priced Stock	SP	\$50,001 - \$100,000	Tax-Deferred	None	None
Kickstart II Seed Fund ⇒ Kickstart II	JT	\$15,001 - \$50,000	None		
DESCRIPTION: Growth Stock,					
Kickstart Seed Fund ⇒ Kickstart II	JT	\$15,001 - \$50,000	None		
DESCRIPTION: Growth Stock					
Radiate Media ⇒ Radiate Media	JT	\$15,001 - \$50,000	None		
DESCRIPTION: Growth Stock					
T. Rowe Price Mutual Fund ⇒ International Discovery	JT	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
T. Rowe Price Mutual Fund ⇒ Mid-Cap Value	JT	\$50,001 - \$100,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
T. Rowe Price Mutual Fund ⇒ Prime Reserve	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
T. Rowe Price Mutual Fund ⇒ Science & Technology	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Utah Retirement System ⇒ State of Utah Retirement System	SP	\$250,001 - \$500,000	Tax-Deferred	None	None
Vanguard 403 (b) 7 account - Donna ⇒ LifeStrategy Mod Growth		\$1,001 - \$15,000	Tax-Deferred	None	None
DESCRIPTION: Asset is part of a 403 (b) 7 account					
Vanguard 403 (b) 7 account - Donna ⇒ Wellesley Income Fund Inv		\$1,001 - \$15,000	Tax-Deferred	None	None
DESCRIPTION: Asset is part of a 403 (b) 7 account					
Vanguard 403 (b) 7 account - Donna ⇒ Wellington Fund Inv		\$15,001 - \$50,000	Tax-Deferred	None	None
DESCRIPTION: Asset is part of a 403 (b) 7 account					
Vanguard 529 College Savings ⇒ Vanguard Aggressive Age-Based Option: Vanguard Growth Portfolio	DC	\$15,001 - \$50,000	Tax-Deferred	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard 529 College Savings ⇒ Vanguard Moderate Age-Based Option: Vanguard Moderate Growth Portfolio	DC	\$15,001 - \$50,000	Tax-Deferred	None	None
Vanguard Brokerage Account ⇒ Chico's FAS, Inc. (CHS)	JT	\$15,001 - \$50,000	None		
Vanguard Brokerage Account ⇒ Chico's FAS, Inc. (CHS)	JT	\$15,001 - \$50,000	None		
Vanguard Mutual Funds ⇒ Vanguard Health Care Fund Admiral Shares	JT	\$100,001 - \$250,000	Tax-Deferred	None	None
Vanguard Mutual Funds ⇒ Vanguard Long-Term Tax-Exempt Fund Investor Shares	JT	\$1 - \$1,000	Tax-Deferred	None	None
Vanguard Mutual Funds ⇒ Vanguard Mid-Cap Index Fund Admiral Shares	JT	\$50,001 - \$100,000	Dividends	None	\$1,001 - \$2,500
Vanguard Mutual Funds ⇒ Vanguard Prime Money Market Fund	JT	\$1,001 - \$15,000	Tax-Deferred	None	None
Vanguard Mutual Funds ⇒ Vanguard Tax-Managed Capital Appreciation Fund Admiral Shares	JT	\$15,001 - \$50,000	Tax-Deferred	None	None
Vanguard Mutual Funds ⇒ Vanguard Wellington Fund Admiral Shares	JT	\$50,001 - \$100,000	Tax-Deferred	None	None
Vanguard Roll IRA ⇒ Vanguard Prime Money Market Fund	SP	\$1 - \$1,000	Tax-Deferred	None	None
Vanguard Roll IRA ⇒ Vanguard Wellington Fund Investor Shares	SP	\$15,001 - \$50,000	Tax-Deferred	None	None
Vanguard Rollover IRA - Donna ⇒ Primecap Fund Admiral		\$100,001 - \$250,000	Tax-Deferred	None	None
Vanguard Rollover IRA - Donna ⇒ Wellington Fund Inv		\$15,001 - \$50,000	Tax-Deferred	None	None
Vanguard Rollover IRA - Donna ⇒ Wellington Fund Inv		\$15,001 - \$50,000	Tax-Deferred	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Roth IRA ⇒ Vanguard Health Care Fund Admiral Shares	SP	\$50,001 - \$100,000	Tax-Deferred	None	None
Vanguard Roth IRA ⇒ Vanguard Windsor II Fund Admiral Shares	SP	\$50,001 - \$100,000	Tax-Deferred	None	None
Vutara ⇒ Vutara	JT	\$15,001 - \$50,000	None		
DESCRIPTION: Growth stock					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Deer Valley Resort	work	\$6,051	\$5,445
State of Utah	Spouse Salary	\$31,845	\$116,848
Salt Lake Chamber Women's Business Center	Speech		\$1,500
Adducent Inc.	Book royalties	\$183	\$386

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	JP Morgan Chase Bank	August 1999	Mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Advisor	Women's Business Initiative, Salt Lake Community College

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Catheter Connections (Owner: JT)
LOCATION: US
- Fidelity IRA
- Fidelity Rollover (Owner: SP)
- Kickstart II Seed Fund (Owner: JT)
LOCATION: US
- Kickstart Seed Fund (Owner: JT)
LOCATION: US
- Radiate Media (Owner: JT)
LOCATION: US
- T. Rowe Price Mutual Fund (Owner: JT)
LOCATION: US
- Utah Retirement System (Owner: SP)
- Vanguard 403 (b) 7 account - Donna
LOCATION: US
- Vanguard 529 College Savings (Owner: DC)
LOCATION: UT
- Vanguard Brokerage Account (Owner: JT)
LOCATION: US
- Vanguard Mutual Funds (Owner: JT)
LOCATION: US
- Vanguard Roll IRA (Owner: SP)
- Vanguard Rollover IRA - Donna
- Vanguard Roth IRA (Owner: SP)
- Vutara (Owner: JT)
LOCATION: US

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

COMMENTS

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: Donna McAleer , 06/8/2014