



Filing ID #10000352

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Steve Harrison
Status: Congressional Candidate
State/District: WV02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2014
Filing Date: 04/10/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------|----------------|-------------------------------|-----------------------|
| 401(k)-JPMorgan Chase ⇒ JP Morgan Chase & Co. (JPM) | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| DESCRIPTION: JPMorgan Chase Common Stock Fund in 401(k) based on Stephen's former employment at Bank One. | | | | | |
| 401(k)-JPMorgan Chase ⇒ Money Market Short-Term Fixed Income Fund | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) for formerly employment at Bank One. | | | | | |
| 401K-The Poca Valley Bank ⇒ American Century Inc & Grth Inv | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ American Century Value Inv | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ American Funds GR FD of Amer R3 | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ Hartford Midcap HLS IA | | \$1,001 - \$15,000 | Tax-Deferred | None | None |

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| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ Hartford Total Ret Bond HLS IA | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ Putnam High Yield Advantage A | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ Stable Value/Money Market-Fixed Account | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ T. Rowe Price Pers Strat Bal | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ T. Rowe Price Pers Strat Grth | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ T. Rowe Price Pers Strat Inc | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 401K-The Poca Valley Bank ⇒ T. Rowe Price Small Cap Stock A | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Stephen's 401(k) at PVB. | | | | | |
| 403(b)-Kanawha Hospice Care, Inc. ⇒ American Century VP Capital Appreciation Fund | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Mutual Fund in Spouse's 403(b). | | | | | |
| 403(b)-Kanawha Hospice Care, Inc. ⇒ Fidelity Investments VIP Asset Manager Portfolio | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Kristen's 403(b). | | | | | |
| 403(b)-Kanawha Hospice Care, Inc. ⇒ Mutual of America Bond Fund | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Kristen's 403(b). | | | | | |
| 403(b)-Kanawha Hospice Care, Inc. ⇒ Mutual of America Conservative Allocation Fund | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| DESCRIPTION: Fund within Kristen's 403(b). | | | | | |
| 403(b)-Kanawha Hospice Care, Inc. ⇒ Mutual of America Mid-Term Bond Fund | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Kristen's 403(b). | | | | | |
| 403(b)-Kanawha Hospice Care, Inc. ⇒ Mutual of America Money Market Fund | SP | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| DESCRIPTION: Fund within Kristen's 403(b). | | | | | |
| Excess Sick Leave Value-The Poca Valley Bank | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: Due to a policy change at The Poca Valley Bank in 2008, Stephen would receive 66 2/3% of the value of sick leave he had in excess of 30 days as of 5/31/2008 if he is still employed at PVB at the time he either retires or becomes disabled. | | | | | |
| Group Life Insurance-The Poca Valley Bank | | \$100,001 - \$250,000 | None | | |
| DESCRIPTION: Stephen's group life insurance through his employment at The Poca Valley Bank. Through Companion Life Insurance Company. | | | | | |
| KSOP-The Poca Valley Bank ⇒ The Poca Valley Bankshares, Inc. stock in KSOP | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| DESCRIPTION: Stock of The Poca Valley Bankshares, Inc. contained in Stephen's account in The Poca Valley Bank KSOP. | | | | | |
| Life Insurance on Son-The Poca Valley Bank | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: Voluntary Life Insurance on son based on Stephen's employment at The Poca Valley Bank. Through Companion Life Insurance Company. | | | | | |
| Life Insurance-MONY Life Insurance Company ⇒ MONY Life Insurance Company policy | SP | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| DESCRIPTION: Life Insurance Policy; Death Benefit is in the \$15,001-\$50,000 tier. Cash Surrender Value is in the \$1,001-\$15,000 tier. Dividend used to purchase paid-up additional insurance. | | | | | |
| State of West Virginia-Public Employees Retirement System ⇒ State of West Virginia PERS account | | Undetermined | Tax-Deferred | None | None |
| DESCRIPTION: This is Stephen's pension account from the State of West Virginia. Value will eventually be determined based on either payments received during collection of retirement benefits or at the time contributions and interest are withdrawn from the system. | | | | | |
| TD Ameritrade Account ⇒ Huntington Bancshares Incorporated (HBAN) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| DESCRIPTION: Huntington Bancshares Inc. stock within TD Ameritrade account. | | | | | |
| Voluntary Life Insurance on Daughter-The Poca Valley Bank | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: Voluntary Life Insurance on daughter based on Stephen's employment at The Poca Valley Bank. Through Companion Life | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|----------------------|----------------|-------------------------------|-----------------------|
| Insurance Company. | | | | | |
| Voluntary Life Insurance on Kristen-The Poca Valley Bank | | \$15,001 - \$50,000 | None | | |
| DESCRIPTION: Voluntary Life Insurance on Kristen based on Stephen's employment at The Poca Valley Bank. Through Companion Life Insurance Company. | | | | | |
| Voluntary Life Insurance on Stephen-The Poca Valley Bank | | \$50,001 - \$100,000 | None | | |
| DESCRIPTION: Voluntary Life Insurance on Stephen based on his employment at The Poca Valley Bank. Through Companion Life Insurance Company. | | | | | |

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

SCHEDULE C: EARNED INCOME

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|----------------------------|------------------|-------------------------------|-----------------------|
| The Poca Valley Bank | Stephen's Salary | \$21,557.68 | \$73,661.94 |
| Kanawha Hospice Care, Inc. | Spouse Salary | N/A | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-----------------|---------------|---|---------------------|
| | Bank of America | 1999 | Brown Alumni Association Platinum Plus Visa credit card | \$15,001 - \$50,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|----------|---|
| Director | ProServ (West Virginia Bankers Association Products & Services) |

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- 401(k)-JPMorgan Chase
DESCRIPTION: Stephen's 401(k) retirement account from his previous employment at Bank One (now JPMorgan Chase).
- 401K-The Poca Valley Bank
DESCRIPTION: Stephen's 401K account at his current employer. Account through Mass Mutual.
- 403(b)-Kanawha Hospice Care, Inc. (Owner: SP)
DESCRIPTION: Kristen's 403(b) retirement account at Kanawha Hospice Care, Inc. (HospiceCare). Account through Mutual of America.
- KSOP-The Poca Valley Bank
DESCRIPTION: Stephen's employee stock ownership account at his current employer, The Poca Valley Bank.
- Life Insurance-MONY Life Insurance Company (Owner: SP)
LOCATION: Syracuse, NY, US
DESCRIPTION: Life Insurance
- State of West Virginia-Public Employees Retirement System
DESCRIPTION: Stephen's Retirement Account from a former employer, West Virginia Legislature.
- TD Ameritrade Account (Owner: JT)
LOCATION: US
DESCRIPTION: TD Ameritrade Account

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: Steve Harrison , 04/10/2014