



Filing ID #10025345

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Joan Perry
Status: Congressional Candidate
State/District: NC03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 03/30/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1/2 1701 Shackleford [OT] <small>DESCRIPTION: 1/2 1701 Shackleford</small>	SP	\$500,001 - \$1,000,000	Rent	\$2,501 - \$5,000	\$2,501 - \$5,000
401(k) [OT] <small>DESCRIPTION: 401(k)</small>		\$500,001 - \$1,000,000	Tax-Deferred		
AXA Annuity [OT] <small>DESCRIPTION: AXA Annuity</small>		\$50,001 - \$100,000	Tax-Deferred		
Bandsworth, Inc. [OT] <small>DESCRIPTION: Bandsworth, Inc.</small>		\$1,001 - \$15,000	Dividends	None	None
Bandwith, Inc. [OT] <small>DESCRIPTION: Bandwith, Inc.</small>	SP	\$1,001 - \$15,000	Dividends	None	None
BB&T Corp [OT] <small>DESCRIPTION: BB&T Corp</small>	SP	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
E & J, LLC [OT] DESCRIPTION: E & J, LLC	SP	\$15,001 - \$50,000	Dividends, Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
ENC, LLC [OT] DESCRIPTION: ENC, LLC	SP	\$1,001 - \$15,000	Rent	\$1 - \$200	\$1 - \$200
First Citizens - SEP [OT] DESCRIPTION: First Citizens - SEP	SP	\$250,001 - \$500,000	Tax-Deferred		
First Citizens Bankshares [OT] DESCRIPTION: First Citizens Bankshares		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Genworth Financial [OT] DESCRIPTION: Genworth Financial		\$15,001 - \$50,000	Dividends	None	None
Lincoln National [OT] DESCRIPTION: Lincoln National	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	\$1 - \$200
Ms. Dees, LLC [OT] DESCRIPTION: Ms. Dees, LLC	SP	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$50,001 - \$100,000
OTW, LLC [OT] DESCRIPTION: OTW, LLC	SP	\$50,001 - \$100,000	Capital Gains, Interest, Real Estate sales	\$5,001 - \$15,000	\$5,001 - \$15,000
Pear Prop, LLC [OT] DESCRIPTION: Pear Prop, LLC	SP	\$250,001 - \$500,000	Capital Gains, Interest, Rent	\$15,001 - \$50,000	\$5,001 - \$15,000
Perry Bros Prop, LLC [OT] DESCRIPTION: Perry Bros Prop, LLC	SP	\$500,001 - \$1,000,000	Capital Gains, Interest, Management Fees, Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Perry Grandchildren [OT] DESCRIPTION: Perry Grandchildren	SP	\$1,000,001 - \$5,000,000	Capital Gains, Interest, Management Fees, Rent	\$15,001 - \$50,000	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Perry Wives, LLC [OT]	SP	\$100,001 - \$250,000	Interest, Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
DESCRIPTION: Perry Wives, LLC					
Perry's, Inc. [OT]	SP	\$500,001 - \$1,000,000	Capital Gains, Interest, Management Fees, Rent	\$50,001 - \$100,000	\$50,001 - \$100,000
DESCRIPTION: Perry's, Inc.					
State Credit Union [OT]	JT	\$500,001 - \$1,000,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: State Credit Union					
Templeton Trust [OT]		\$250,001 - \$500,000	Dividends, Interest	None	None
DESCRIPTION: Templeton Trust					
Wells Fargo - cash [OT]	SP	\$1 - \$1,000	Interest	None	None
DESCRIPTION: Wells Fargo - cash					

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Kinston Pediatric Associates, P.A.	Salary	\$70,567.00	\$81,628.00
Lenoir Memorial Hospital, Inc.	Medical Services	\$29,132.00	\$37,968.00
James S. Perry, Attorney	Spouse Business	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Governors (formerly)	UNC Chapel Hill
Board Member	Angel Ministries

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

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: Joan Perry , 03/30/2019