



Filing ID #10032399

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Robert Lee Perry
Status: Congressional Candidate
State/District: KY02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 01/25/2020
Period Covered: 01/01/2018– 12/31/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Aberdeen Standard Physical Platinum Shares ETF (PPLT) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Aberdeen Standard Physical Silver Shares ETF (SIVR) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Carla's Retirement ⇒ AM Cent MD CP Val R6 [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Carla's Retirement ⇒ FA Stk SEL ALL Cap Z [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Carla's Retirement ⇒ J H Enterprise N Large Cap [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Carla's Retirement ⇒ Principal LifeTm 2050 Sep Acct [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Carla's Retirement ⇒ T-C Lifecylce 2040-Rtmt [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Casey Farm [FA]		\$100,001 - \$250,000	Timber	None	\$2,501 - \$5,000
LOCATION: Waynesburg / Casey, KY, US DESCRIPTION: Around 130 Acres in Casey County Kentucky, which I am reforesting.					
Caterpillar, Inc. (CAT) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	None
Dollar General Corporation (DG) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
IRA ⇒ Aberdeen Standard Physical Gold Shares ETF (SGOL) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
IRA ⇒ Aberdeen Standard Physical Silver Shares ETF (SIVR) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
IRA ⇒ Deere & Company (DE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Fidelity MSCI Communication Services Index ETF (FCOM) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
IRA ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ Schwab U.S. REIT ETF (SCHH) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ SPDR Series Trust SPDR S&P Oil & Gas Equipment & Services ETF (XES) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ TD Ameritrade Deposit Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
IRA ⇒ Vanguard Consumer Staples ETF (VDC) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ Vanguard Energy ETF (VDE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA ⇒ Vanguard Real Estate ETF (VNQ) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Join Checking [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Join HSA [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Kings Mtn Farm [FA]		\$15,001 - \$50,000	Rent	\$201 - \$1,000	\$201 - \$1,000
LOCATION: Kings Mtn / Lincoln, KY, US DESCRIPTION: Around 32 fragmented acres in Kings Mountain Ky. It is leased out for hay and grazing.					
Lee Perry Trees, LLC ⇒ Lee Perry Trees Checking [BA]		\$1,001 - \$15,000	None		
Lodestone Technologies, LLC ⇒ Aberdeen Standard Physical Gold Shares ETF (SGOL) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Lodestone Technologies, LLC ⇒ Aberdeen Standard Physical Palladium Shares ETF (PALL) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Lodestone Technologies, LLC ⇒ Aberdeen Standard Physical Platinum Shares ETF (PPLT) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Lodestone Technologies, LLC ⇒ Aberdeen Standard Physical Silver Shares ETF (SIVR) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Lodestone Technologies, LLC ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Lodestone Technologies, LLC ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Lodestone Technologies, LLC ⇒ BMO HARRIS BK NATL ASSN CHICAG CD 10/01/2020 [BA]		\$15,001 - \$50,000	Interest	None	None
Lodestone Technologies, LLC ⇒ Caterpillar, Inc. (CAT) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Lodestone Technologies, LLC ⇒ Deere & Company (DE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Lodestone Technologies, LLC ⇒ EAST BOSTON SVGS BK MA CD 06/26/2020 [BA]		\$15,001 - \$50,000	Interest	None	None
Lodestone Technologies, LLC ⇒ EAST WEST BK PASADENA CAL CD 03/19/2020 [BA]		\$15,001 - \$50,000	Interest	None	None
Lodestone Technologies, LLC ⇒ Facebook, Inc. - Class A (FB) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	None
Lodestone Technologies, LLC ⇒ iShares China Large-Cap ETF (FXI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	None
Lodestone Technologies, LLC ⇒ Lodestone Checking [BA]		\$50,001 - \$100,000	None		
Lodestone Technologies, LLC ⇒ Schwab U.S. REIT ETF (SCHH) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ SECURITIES (15140RBB4) CENTIER BK WHITING IND 2.0 % due 12/26/2018 [BA]		None	Interest	None	\$1 - \$200
Lodestone Technologies, LLC ⇒ SECURITIES (61760APU7) MORGAN STANLEY PVT BK PURCHASE 2.45 % due 09/20/2019 [BA]		None	Interest	\$201 - \$1,000	None
Lodestone Technologies, LLC ⇒ SECURITIES (87164YXW9) SYNCHRONY BANK 2.15 % due 03/21/2019 [BA]		None	Interest	\$1 - \$200	None
Lodestone Technologies, LLC ⇒ SECURITIES (949763HU3) WELLS FARGO BANK NATIONAL ASSN 1.65 % due 06/21/2019 [BA]		None	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Lodestone Technologies, LLC ⇒ SECURITIES (949763QJ8) WELLS FARGO BANK NATIONAL ASSN 2.25 % due 06/10/2019 [BA]		None	Interest	\$1 - \$200	\$1 - \$200
Lodestone Technologies, LLC ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ SPDR S&P Aerospace & Defense ETF (XAR) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1 - \$200
Lodestone Technologies, LLC ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ SPDR Select Sector Fund - Industrial (XLI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ TD Ameritrade Deposit Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Lodestone Technologies, LLC ⇒ Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$2,501 - \$5,000
Lodestone Technologies, LLC ⇒ Vanguard Consumer Discretion ETF (VCR) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ Vanguard Energy ETF (VDE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Lodestone Technologies, LLC ⇒ Vanguard Industrials ETF (VIS) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒ Vanguard Real Estate ETF (VNQ) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Lodestone Technologies, LLC ⇒		\$15,001 - \$50,000	Interest	\$201 -	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
WELLS FARGO BANK NATIONAL ASSN CD 01/28/2020 [BA]				\$1,000	
Norfolk Southern Corporation (NSC) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
Personal Checking [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Schwab U.S. REIT ETF (SCHH) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
SPDR Select Sector Fund - Consumer Staples (XLP) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
SPDR Select Sector Fund - Industrial (XLI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
TD Ameritrade Deposit Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Thompson Perry Properties, LLC ⇒ Dr. Thompson's House [RP] LOCATION: Kings Mtn / Lincoln, KY, US		\$15,001 - \$50,000	Rent	\$2,501 - \$5,000	\$2,501 - \$5,000
Thompson Perry Properties, LLC ⇒ Thompson Perry Checking [BA]		\$1,001 - \$15,000	None		
Vanguard Consumer Discretion ETF (VCR) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Vanguard Energy ETF (VDE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
Vanguard Industrials ETF (VIS) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500

* Asset class details available at the bottom of this form. 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
Response Technologies, Ltd COMMENTS: Via Lodestone Technologies, LLC	Software Consulting	\$13,200.00	N/A
OSG Corp COMMENTS: Via Lodestone Technologies, LLC	Software Consulting	\$4,482.50	\$28,950.00
Henderex COMMENTS: Via Lodestone Technologies, LLC	Software Consulting	\$200,812.50	\$191,912.50
Shakertown at Pleasant Hill	Spouse Salary	\$22,284.06	\$39,984.85
Hagyard Equine Medical Institute	Spouses Salary	\$21,000.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	John Deere Financial	Fall 2016	Financing on a Tractor	\$10,000 - \$15,000
	Caliber Home Loans	Feb 2014	Home Loan	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
At large	LPKY District 2

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">Carla's Retirement (Owner: SP)IRALee Perry Trees, LLC

LOCATION: US

DESCRIPTION: LLC for managing timber and related assets

- Lodestone Technologies, LLC

LOCATION: US

DESCRIPTION: LLC through which I consult

- Thompson Perry Properties, LLC

LOCATION: US

DESCRIPTION: Owns a 100+ year old ancestral home being held as a rental property in an attempt to keep it in the family.

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: Robert Lee Perry , 01/25/2020