

# FINANCIAL DISCLOSURE REPORT

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### FILER INFORMATION

Name: Hon. Debbie Mucarsel-Powell

Status: Member State/District: FL26

### FILING INFORMATION

**Filing Type:** New Filer Report

Filing Year: 2018

**Filing Date:** 08/13/2019

# SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Express HYSA [BA]	JT	\$100,001 - \$250,000	Interest	Not Applicable	\$1,001 - \$2,500
American Funds- Rollover IRA $\Rightarrow$ Growth Fund of America-A [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Bank of America [BA]	JT	\$15,001 - \$50,000	None		
Robert L. Powell Jr., PA [OL]  LOCATION: Pinecrest, FL, US  DESCRIPTION: Legal Services  COMMENTS: 2018 Ordinary income \$106,730	SP	\$1,001 - \$15,000	Ordinary Income	Not Applicable	\$100,001 - \$1,000,000
TD Ameritrade Account - SEP IRA ⇒ Insured Deposit Account [BA]		\$1,001 - \$15,000	Tax-Deferred		
TD Ameritrade Account - SEP IRA ⇒ iShares Trust Aggressive Allocation ETF (AOA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
TD Ameritrade Account - SEP IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares Trust S&P 500 Value ETF (IVE) [EF]					
TD Ameritrade Account - SEP IRA ⇒ Vanguard MidCap Value ETF (VOE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Valic - State of Florida Optional Retirement Plan ⇒ American Funds EuroPacific R3 (RERCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Valic - State of Florida Optional Retirement Plan ⇒ Columbia Balanced A (CBLAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Valic - State of Florida Optional Retirement Plan ⇒ Fixed Interest Option [MF]		\$15,001 - \$50,000	Tax-Deferred		
Valic - State of Florida Optional Retirement Plan ⇒ Janus Hend Small Cap Value S (JISCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Valic - State of Florida Optional Retirement Plan ⇒ JPMorgan Equity Index I (HLEIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Valic - State of Florida Optional Retirement Plan ⇒ Legg Mason Clearbridge Mid Cap A (LMREX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard 529 Plan # 1 ⇒ Income - Conservative Age-based [5P] LOCATION: NV	DC	\$1,001 - \$15,000	Tax-Deferred		
Vanguard 529 Plan # 1 ⇒ Moderate Age-based [5P] Location: NV	DC	\$1,001 - \$15,000	Tax-Deferred		
Vanguard 529 Plan # 1 ⇒ Moderate Growth - Aggressive Age-based [5P] LOCATION: NV	DC	\$1,001 - \$15,000	Tax-Deferred		
Vanguard 529 Plan # 2 ⇒	DC	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Aggressive Age-based [5P]					
Location: NV					
Vanguard 529 Plan # 2 ⇒ Income - Moderate Age-based [5P]	DC	\$1,001 - \$15,000	Tax-Deferred		
Location: NV					

<sup>\*</sup> Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit  $\underline{ \text{https://fd.house.gov/reference/asset-type-codes.aspx}}.$ 

## SCHEDULE C: EARNED INCOME

Source	Туре	Amount Current Year to Filing	Amount Preceding Year
Felman Trading Inc	Spouse Salary	N/A	N/A
Felman Trading Americas	Spouse Salary	N/A	N/A
Fiesta Restaurant Group	Spouse Salary	N/A	N/A
Robert L Powell Jr., PA	Spouse income	N/A	N/A

# SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Туре	Amount of Liability
SP	American Express	December 2018	Consumer debt credit card	\$10,000 - \$15,000
JT	Citibank	December 2018	Consumer debt credit card	\$10,000 - \$15,000
	Navient	1988-1992	Consolidated Student loans	\$15,001 - \$50,000
SP	MOHELA	1996-1999	Consolidated Student loans	\$50,001 - \$100,000
JT	Wells Fargo Home Mortgage	September 2017	Home mortgage	\$500,001 - \$1,000,000
	Navient	1994-1996	Consolidated Student loans	\$10,000 - \$15,000

# SCHEDULE E: Positions

Position	Name of Organization
Managing Member	D Mucarsel-Powell & Associates, LLC

#### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
July 2011	Filer and State of Florida	Continuing participation in a defined benefit retirement plan managed by former employer. Employer no longer contributes to the plan.

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

Source (Name and Address)	Brief Description of Duties
GKollaborative, Inc. (Miami, FL, US)	Non-Profit Consulting Services

#### SCHEDULE A ASSET CLASS DETAILS

- American Funds- Rollover IRA (Owner: SP)
- TD Ameritrade Account SEP IRA
- o Valic State of Florida Optional Retirement Plan
- Vanguard 529 Plan # 1 (Owner: DC) Location: NV
- Vanguard 529 Plan # 2 (Owner: DC) Location: NV

### 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?

C 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: Hon. Debbie Mucarsel-Powell, 08/13/2019