

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Ron Estes

Status: Congressional Candidate

State/District: KS04

FILING INFORMATION

Filing Type: Candidate Report

Filing Year: 2017

Filing Date: 03/9/2017

Period Covered: 01/01/2016-03/12/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Hewitt/Koch 401K ⇒ Balanced Index Allocation		\$15,001 - \$50,000	Tax-Deferred		
Description: Balanced index fune					
Hewitt/Koch 401K ⇒ GIC Stable Value		\$250,001 - \$500,000	Tax-Deferred		
Description: Stable value fund					
Hewitt/Koch 401K ⇒ Mid-Cap Index		\$1,001 - \$15,000	Tax-Deferred		
Hewitt/Koch 401K ⇒ Target Retirement 2040		\$15,001 - \$50,000	Tax-Deferred		
Description: Age based retirement account					
Hewitt/Koch 401K ⇒ Total US Aggregate Bond Market		\$50,001 - \$100,000	Tax-Deferred		
Description: Bond market fund					
Hewitt/Koch 401K ⇒ US Value Index		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Intrust checking and savings	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Kansas Learning Quest ⇒ ACI - Aggressive Track Conservative Portfolio Description: DC2 account		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: DC2 account					
Kansas Learning Quest ⇒ ACI Aggressive Track Moderate Portfolio		\$15,001 - \$50,000	Tax-Deferred		
Description: DC3 account					
KPERS		Undetermined	None		
Description: Pension value is determined at ret	irement				
KPERS 457 ⇒ DFA US Large Cap Value 1		\$1,001 - \$15,000	Tax-Deferred		
KPERS 457 ⇒ Stable Value Fund		\$50,001 - \$100,000	Tax-Deferred		
Description: Stable value fund					
KPERS 457 ⇒ T Rowe Price Capital Appreciation		\$1,001 - \$15,000	Tax-Deferred		
Description: Balanced fund					
KPERS 457 ⇒ Vanguard Total Bond Market Index Inst		\$1,001 - \$15,000	Tax-Deferred		
Description: Bond fund					
Mid American Credit Union		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Mid American Credit Union	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA \Rightarrow American Balanced Fund Cl F2		\$1,001 - \$15,000	Tax-Deferred		
Description: Growth and income					
Roth IRA ⇒ American Mutual Fund Cl F2 Description: Growth and income		\$1,001 - \$15,000	Tax-Deferred		
$\begin{array}{l} \text{Roth IRA} \Rightarrow \\ \text{Capital World Growth and Income fund Cl} \end{array}$		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
F2					
Description: Growth and income					
Roth IRA ⇒ Investment Company of America Description: Growth and Income		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ JP Morgan Mid Cap Value Cl L DESCRIPTION: Growth		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ JPMorgan Government Bond Fund Select Class Description: Income		\$1 - \$1,000	Tax-Deferred		
Roth IRA ⇒ MFS Corporate Bond Fund Cl 1 DESCRIPTION: Income		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ MFS New Discovery Fund Cl 1 Description: Growth		\$1 - \$1,000	Tax-Deferred		
Roth IRA ⇒ New Perspective Fund Cl F2 Description: Growth and Income		\$1,001 - \$15,000	Tax-Deferred		
Spouse 401k Description: Nationwide 401k	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse 401k DESCRIPTION: CUNA Mutual Group 401k	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse 403b Description: The Legend Group 403b	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse KPERS DESCRIPTION: Spouse KPERS	SP	\$1 - \$1,000	Tax-Deferred		
Spouse Roth IRA DESCRIPTION: Spouse Roth IRA	SP	\$15,001 - \$50,000	Tax-Deferred		

SCHEDULE C: EARNED INCOME

Source	Туре	Amount Current Year to Filing	Amount Preceding Year
State of Kansas	salary	\$16,538.05	\$86,003.06
AFP	spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owne	r Creditor	Date Incurred	Туре	Amount of Liability
DC	Department of Education	August 2013; August 2016	Student loans	\$10,000 - \$15,000
	Citibank Mastercard	May 2016	Credit card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Trustees	Kansas Public Employee Retirement System
Board Member	Pooled Money Investment Board
Kansas State Treasurer	State of Kansas

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
April 2017	State of Kansas and myself	Participation in the pension system and the 457 plan

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

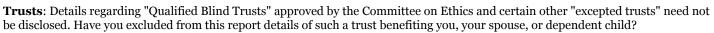
None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Hewitt/Koch 401K
- Kansas Learning Quest Location: KS
- o KPERS 457
- Roth IRA

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

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION



○ 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?

C 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: Ron Estes, 03/9/2017