



Filing ID #10029625

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Mr. Brian J. Burley  
**Status:** Congressional Candidate  
**State/District:** CA48

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 11/4/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AF Europac Growth R6 [OT] DESCRIPTION: 403b TDA Plan Stock		\$1,001 - \$15,000	Tax-Deferred		
Burley Technology LLC, 100% Interest [OL] LOCATION: Huntington Beach, CA, US DESCRIPTION: Single-Member LLC owned by Brian Burley. No income to report as of 10/2019.		\$50,001 - \$100,000	None		
Crln E Mid Cap GR R6 [OT] DESCRIPTION: 401(a) Stock		\$1,001 - \$15,000	Tax-Deferred		
Crln E Mid Cap GR R6 [OT] DESCRIPTION: 403b TDA Plan Stock		\$1,001 - \$15,000	Tax-Deferred		
FID Balanced K [OT] DESCRIPTION: 401(a) Blended Investments		\$1,001 - \$15,000	Tax-Deferred		
FID Contrafund K [OT] DESCRIPTION: 403b TDA Plan Stock		\$1,001 - \$15,000	Tax-Deferred		
FID Contrafund K [OT]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: 401(a) Stock					
GS SM Cap Value Inst [OT]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: 403b TDA Plan Stock					
JH Discpl Value R6 [OT]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: 403b TDA Plan Stock					
JH Discpl Value R6 [OT]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: 401(a) Stock					
MFS Mid Cap Value R6 [OT]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 401(a) Stock					
MFS Mid Cap Value R6 [OT]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: 403b TDA Plan Stock					
NB Sustain Eq R6 [OT]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: 403b TDA Plan Stock					
Personal Checking Account [BA]		\$15,001 - \$50,000	None		
DESCRIPTION: Chase Account					
Personal Checking Account [BA]		\$1,001 - \$15,000	None		
DESCRIPTION: USBank Account					
PIF Real EST SEC IS [OT]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: 403b TDA Plan Stock					
PIF Real EST SEC IS [OT]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: 401(a) Stock					
PIM Real Return Inst [OT]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: 401(a) Bond					
Vang Inst Index Plus [OT]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 401(a) Stock					
Vang Inst Index Plus [OT]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: 403b TDA Plan Stock					
Vang MidCap Idx Inst [OT]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: 403b TDA Plan Stock					
WF SM Co Growth IS [OT]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 403b TDA Plan Stock					

\* 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
University of Southern California	Employment Salary	N/A	N/A
COMMENTS: I cannot disclose my salary due to my job role in information technology, and the requirement that I do not disclose any employee salary information in my role. Agreement is below: The security and confidentiality of employee salary information are matters of concern to all USC employees. Those employees with access to this information are in a unique position of trust in maintaining the security and confidentiality of such information. Violation of this policy will lead to reprimand, suspen			

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nelnet	August 2012-December 2016	Student Loan Debt	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner/Founder	Burley Technology LLC
Information Technology Analyst	University of Southern California

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2019	University of Southern California and Brian Burley	The security and confidentiality of employee salary information are matters of concern to all USC employees. Those employees with access to this information are in a unique position of trust in maintaining the security and confidentiality of such information. Violation of this policy will lead to reprimand, suspension, or dismissal consistent with the University of Southern California personnel and employment policies.
COMMENTS: Confidentiality agreement also included in salary section of Financial Disclosure.		

Date	Parties To	Terms of Agreement

**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:** Mr. Brian J. Burley , 11/4/2019