



Filing ID #10019172

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Dave Belote
Status: Congressional Candidate
State/District: VA02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 10/24/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Belote Consulting LLC, 100% Interest LOCATION: Virginia Beach , VA, US DESCRIPTION: Inactive company	JT	\$1 - \$1,000	None		
Belote Family Living Trust ⇒ Rental portion of personal residence LOCATION: Virginia Beach, VA, US DESCRIPTION: Rent from 29-year-old son	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
Belote Family Living Trust ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Belote Family Living Trust ⇒ Vanguard High-Yield Tax-Exempt Fund Investor Shares	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Belote Family Living Trust ⇒ Vanguard Intermediate-Term Tax-Exempt Fund Investor Shares	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Belote Family Living Trust ⇒ Vanguard Mid-Cap Index Fund Admiral Shares	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Belote Family Living Trust ⇒ Vanguard Tax-Managed Capital Appreciation Fund Admiral Shares	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
DARE Strategies LLC, 100% Interest	JT	\$50,001 - \$100,000	Consulting fees	\$50,001 - \$100,000	None
LOCATION: Virginia Beach, VA, US DESCRIPTION: Service-Disabled Veteran-Owned Small Business providing consulting services in renewable energy and defense policy and legislation					
DARE Strategies LLC Individual 401(k) ⇒ Vanguard 500 Index Fund Investor Shares		\$1,001 - \$15,000	Tax-Deferred		
DARE Strategies LLC Individual 401(k) ⇒ Vanguard Total International Stock Index Fund Investor Shares		\$1,001 - \$15,000	Tax-Deferred		
Howard D Belote Roth IRA ⇒ Vanguard PRIMECAP Core Fund		\$15,001 - \$50,000	Tax-Deferred		
Howard D Belote Roth IRA ⇒ Vanguard PRIMECAP Fund Investor Shares		\$15,001 - \$50,000	Tax-Deferred		
Howard D Belote Roth IRA ⇒ Vanguard REIT Index Fund Admiral Shares		\$15,001 - \$50,000	Tax-Deferred		
Howard D Belote Roth IRA ⇒ Vanguard Total International Stock Index Fund Admiral Shares		\$50,001 - \$100,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard 500 Index Fund Admiral Class		\$100,001 - \$250,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard Emerging Markets Stock Index Admiral Shares		\$50,001 - \$100,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard Energy Fund Investor Shares		\$1,001 - \$15,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard High-Yield Corporate Fund Investor Shares		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Howard D Belote Traditional IRA ⇒ Vanguard Intermediate-Term Treasury Fund Investor Shares		\$15,001 - \$50,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard Mid-Cap Growth Index Fund Admiral Shares		\$15,001 - \$50,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard PRIMECAP Core Fund Investor Shares		\$1,001 - \$15,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard PRIMECAP Fund Investor Shares		\$15,001 - \$50,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard Small-Cap Index Fund Admiral Shares		\$50,001 - \$100,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard Total Bond Market Index Fund Admiral Shares		\$15,001 - \$50,000	Tax-Deferred		
Howard D Belote Traditional IRA ⇒ Vanguard Total International Bond Index Fund Admiral Shares		\$50,001 - \$100,000	Tax-Deferred		
NFCU Checking Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
NFCU Savings Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Pamela R Belote Roth IRA ⇒ Vanguard Total Bond Market Index Fund Admiral Shares	SP	\$1,001 - \$15,000	Tax-Deferred		
Pamela R Belote Roth IRA ⇒ Vanguard Total International Stock Index Fund Admiral Shares	SP	\$15,001 - \$50,000	Tax-Deferred		
Pamela R Belote Roth IRA ⇒ Vanguard Total Stock Market Index Fund Admiral Shares	SP	\$15,001 - \$50,000	Tax-Deferred		
Pamela R Belote Traditional IRA ⇒ Vanguard Total International Stock Index Fund Admiral Shares	SP	\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rental Property in Southern Shores NC	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Southern Shores , NC, US					
USAA Checking Account	JT	\$1,001 - \$15,000	None		
USAA Savings Account	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Cassidy & Associates, Inc.	salary	\$115,000.00	\$115,000.00
DARE Strategies LLC	salary	\$30,000.00	\$30,000.00
City of Virginia Beach Public Schools	spouse salary	\$36,000.00	\$24,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Navy Federal Credit Union	August 2013	mortgage on principal residence in Virginia Beach VA	\$500,001 - \$1,000,000
JT	Navy Federal Credit Union	December 2016	Mortgage on rental property in Southern Shores NC	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Chapter Director	Mid-Atlantic Chapter, Environmental Entrepreneurs
Vice President	Board of Directors, Chanco on the James
COMMENTS: Episcopal church-owned summer camp and conference center in Surry County VA	
Director	Eggleston Services, Inc.
COMMENTS: Non-profit corporation providing employment and support to special-needs adults	

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Belote Family Living Trust (Owner: JT)
DESCRIPTION: Family Trust, dated 05-19-1997
- DARE Strategies LLC Individual 401(k)
DESCRIPTION: Vanguard Small Business Account
- Howard D Belote Roth IRA
DESCRIPTION: Vanguard account
- Howard D Belote Traditional IRA
DESCRIPTION: Vanguard Brokerage Account
- Pamela R Belote Roth IRA (Owner: SP)
DESCRIPTION: Vanguard account
- Pamela R Belote Traditional IRA (Owner: SP)
DESCRIPTION: Vanguard account

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: Dave Belote , 10/24/2017