



Filing ID #10009701

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Cory S Simpson
Status: Congressional Candidate
State/District: WV02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2016
Filing Date: 03/7/2016
Period Covered: 01/01/2015– 02/29/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Calvert Global Water Fd Cl A	SP	None	Capital Gains	None	None
IShares MSCI Brazil Capped	SP	None	Capital Gains	None	None
IShares MSCI EAFE	SP	None	Capital Gains	None	None
IShares Select Dividend ETF	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$15,001 - \$50,000
Merrill Lynch Cash	SP	\$1 - \$1,000	None		
PNC Bank	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Ready Asset Gov Liq Fd	SP	\$1 - \$1,000	Dividends	None	None
Residential Rental Property		\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
LOCATION: Tacoma, WA, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ROTH IRA ⇒ USAA Bank Deposit		\$15,001 - \$50,000	Tax-Deferred		
ROTH IRA ⇒ USAA NASDAQ 100 Index Retail		\$1,001 - \$15,000	Tax-Deferred		
ROTH IRA ⇒ USAA Small Cap Stock Fd Retail		\$1,001 - \$15,000	Tax-Deferred		
ROTH IRA ⇒ USAA Target Retirement Fd 2040 Retail		\$1,001 - \$15,000	Tax-Deferred		
Royal Bank of Scotland	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
USAA Emerging Markets Fd Instl		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
USAA Fed Sav Bank	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
USAA Fed Sav Bank		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
USAA Growth Fund Instl		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
USAA Income Stock Fund Instl		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
USAA International Fd Instl		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
USAA Managed Alloc Fd Retail		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
USAA Real Return Fd Instl		None	Capital Gains, Dividends	None	\$1 - \$200
USAA Small Cap Stock Fd Instl		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
USAA Tax Exempt Intermed Term		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
USAA Tax Exempt Money Market		\$1,001 - \$15,000	Dividends	None	None
USAA Tax Exempt Short Term Retail		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Whole Foods Market, Inc. (WFM)	SP	None	Capital Gains, Dividends	None	None

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Military Pay	Active duty salary	N/A	N/A
Military Pay	Spouse- school stipend	N/A	N/A
Military Pay	Spouse- active duty	N/A	N/A
Univ Virginia Medical School Foundation	Spouse- Award	N/A	\$950

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Washington Federal	June 2012	Mortgage on residential rental property	\$100,001 - \$250,000
	Suntrust	August 2003	Student Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Chapter President	American Inn of Court

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"> ROTH IRA
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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: Cory S Simpson , 03/7/2016