



Filing ID #10019408

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Kathleen Williams
Status: Congressional Candidate
State/District: MToo

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 11/27/2017
Period Covered: 01/01/2016– 10/31/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds ⇒ AMCAP Fund-A		\$15,001 - \$50,000	Tax-Deferred		
American Funds		\$15,001 - \$50,000	None		
COMMENTS: asset is gaining in value, but no dividends are paid					
American Funds ⇒ Capital World Growth and Income Fund-A		\$1,001 - \$15,000	Tax-Deferred		
American Funds ⇒ Washington Mutual Investors Fund-A		\$15,001 - \$50,000	Tax-Deferred		
Hartford Funds ⇒ Capital Appreciation		\$1,001 - \$15,000	None		
Hartford Funds ⇒ Dividend and Growth		\$1,001 - \$15,000	None		
Hartford Funds ⇒ equity and growth		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Hartford Funds ⇒ Hartford Balanced		\$1,001 - \$15,000	None		
COMMENTS: these earn, but I am not taking dividends					
Hartford Funds ⇒ Hartford International Opportunities		\$1,001 - \$15,000	None		
Hartford Funds ⇒ VT Intl Value		\$1,001 - \$15,000	None		
Jetway Geographer LLC, 100% Interest		\$1 - \$1,000	sales	None	None
LOCATION: Bozeman/Gallatin, MT, US DESCRIPTION: Books are for sale, but not being actively marketed.					
Kathleen Savings		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
COMMENTS: Cash in bank					
Tom's Checking/Savings		\$50,001 - \$100,000	Interest	None	\$1 - \$200
COMMENTS: These funds were moved to an estate account upon Tom's passing, and that account will be closed upon conclusion of probate, with the cash accruing to me (spouse).					
WV O&G interests		\$1 - \$1,000	None		
LOCATION: Upshur County, WV, US COMMENTS: These are shares in oil and gas wells that have been more expensive in taxes than they have ever paid in dividends. These were Tom's, passed down the family. Because he didn't have a will, they would have gone 1/2 to me and 1/4 each to Tom's sons. I drafted a quit claim deed for them to sign (so they didn't have to pay the taxes), so the full (partial) interests stay with me.					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Western Landowners Alliance	as an employee	\$28,390.70	\$58,197.78
COMMENTS: I went to half time in 2017.			
State of Montana	for the last couple weeks of my legislative term in 2016		\$684.99

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- American Funds
- Hartford Funds

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

COMMENTS

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: Kathleen Williams , 11/27/2017