



Filing ID #10017391

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Rochelle Lyn Wilcox  
**Status:** Congressional Candidate  
**State/District:** CA04

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 09/25/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Carriage	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Citrus Heights, CA, US					
Cranford	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Citrus Heights, CA, US					
Curlew	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Citrus Heights, CA, US					
Dartmouth	SP	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Roseville, CA, US					
E*Trade Securities	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Al's E*TRADE IRA					
Golden 1 Credit Union	JT	\$100,001 - \$250,000	Interest	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Hilltop Securities Money Market	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Hilltop Securities Money Market, Securities					
Merlindale	SP	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Citrus Heights, CA, US					
One America 401(k) ⇒ America Fds Fundamental R6		\$50,001 - \$100,000	Tax-Deferred		
One America 401(k) ⇒ Brandes Investment Advisors		\$50,001 - \$100,000	Tax-Deferred		
One America 401(k) ⇒ Columbia Tr Focused Large Cap		\$15,001 - \$50,000	Tax-Deferred		
One America 401(k) ⇒ Galliard Retirement Income Fd		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Rochelle 401(k)					
One America 401(k) ⇒ Goldman Sachs Small Value R6		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Rochelle 401(k) Profit Sharing Plan					
One America 401(k) ⇒ Invesco Int'l Growth Trust		\$50,001 - \$100,000	Tax-Deferred		
One America 401(k) ⇒ MetWest Total Ret Bd Fd I		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Rochelle 401(k)					
One America 401(k) ⇒ MFS Mid Cap Growth R5		\$15,001 - \$50,000	Tax-Deferred		
One America 401(k) ⇒ PIMCO Total Return Inst		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Rochelle 401(k)					
One America 401(k) ⇒ RS Small Cap Growth		\$1,001 - \$15,000	Tax-Deferred		
Safe Credit Union	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Savings Plus ⇒ Savings Plus	SP	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Al's 401(k)					
Vanguard ⇒ Vanguard 529 College Savings Plan		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Albert 529 plans					
Vanguard ⇒ Vanguard 529 College Savings Plan	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Stephen 529					
Wells Fargo	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Yeoman	SP	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Citrus Heights, CA, US					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Davis Wright Tremaine LLP	Partner Distribution/Draw	\$157,500.00	\$230,000.00
State of California	Spouse Salary	\$69,348.00	\$92,464.92

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	NationStar Mortgage LLC	July 2013	Home Mortgage	\$250,001 - \$500,000
JT	Safe Credit Union	August 2013	Mortgage Carriage	\$100,001 - \$250,000
JT	Safe Credit Union	August 2013	Mortgage Curlew	\$100,001 - \$250,000
JT	Safe Credit Union	August 2013	Cranford Mortgage	\$100,001 - \$250,000
JT	Chrysler Capital	November 2014	Car loan	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Partner	Davis Wright Tremaine LLP

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2017	Davis Wright Tremaine and Rochelle Wilcox	Contract for legal services during 2017; annual draw of \$210,000

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- One America 401(k)  
DESCRIPTION: Rochelle's 401(k) Profit Sharing Plan and Trust
- Savings Plus (Owner: SP)  
DESCRIPTION: Al's 401(k)
- Vanguard  
LOCATION: NV  
DESCRIPTION: Rochelle's 529 for Albert
- Vanguard (Owner: SP)  
LOCATION: NV  
DESCRIPTION: Al's 529 for Stephen

## 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:** Rochelle Lyn Wilcox , 09/25/2017