



Filing ID #10008848

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Joel Martin Rubin
Status: Congressional Candidate
State/District: MDo8

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2015
Filing Date: 12/30/2015
Period Covered: 01/01/2014– 12/20/2015

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Condo - Rental Property	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Washington, DC, US					
ETrade Roth IRA ⇒ Alphabet Inc. - Class A (GOOGL)	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG)	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Facebook, Inc. - Class A (FB)	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Oracle Corporation (ORCL)	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Salesforce.com Inc (CRM)	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Walt Disney Company (DIS)	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Maryland College Investment Plan - DC1 ⇒ Portfolio 2024 LOCATION: MD	JT	\$15,001 - \$50,000	Tax-Deferred		
Maryland College Investment Plan - DC2 ⇒ Portfolio 2027 LOCATION: MD	JT	\$1,001 - \$15,000	Tax-Deferred		
Maryland College Investment Plan - DC3 ⇒ Portfolio 2027 LOCATION: MD	JT	\$1,001 - \$15,000	Tax-Deferred		
Maryland College Savings - Prepaid College Trust DC1 ⇒ Portfolio 2024 LOCATION: MD	JT	\$1,001 - \$15,000	Tax-Deferred		
Maryland College Savings - Prepaid College Trust DC1 ⇒ Portfolio 2024 LOCATION: MD	JT	\$1,001 - \$15,000	Tax-Deferred		
Maryland College Savings - Prepaid College Trust DC2 ⇒ Portfolio 2025 LOCATION: MD	JT	\$15,001 - \$50,000	Tax-Deferred		
Maryland College Savings - Prepaid College Trust DC3 ⇒ Portfolio 2028 LOCATION: MD	JT	\$1,001 - \$15,000	Tax-Deferred		
Maryland College Savings - Prepaid College Trust DC3 ⇒ Portfolio 2028 LOCATION: MD	JT	\$15,001 - \$50,000	Tax-Deferred		
Senate Federal Credit Union	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Snowden Lane Partners ⇒ AXA Accumulator Plus (NQ) ⇒ AXA Aggressive Allocation		\$1,001 - \$15,000	Tax-Deferred		
Snowden Lane Partners ⇒ AXA Accumulator Plus (NQ) ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AXA Moderate-Plus Allocation					
Snowden Lane Partners ⇒ Roth IRA ⇒ Goldman Sachs Group, Inc. (GS)		\$1,001 - \$15,000	Tax-Deferred		
State of Israel Bond		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Vanguard 403(b)(7) ⇒ VGENX - Energy Fund Investor		\$1,001 - \$15,000	Tax-Deferred		
Vanguard 403(b)(7) ⇒ VGHCX - Health Care Fund Inv.		\$15,001 - \$50,000	Tax-Deferred		
Vanguard 403(b)(7) ⇒ VGPMX - Precious Metals and Mining		\$1,001 - \$15,000	Tax-Deferred		
Washington Strategy Group (Consulting LLC), LOCATION: Chevy Chase, MD, US DESCRIPTION: Domestic LLC - Foreign policy advisory firm. 100% ownership.		\$1,001 - \$15,000	Single Member LLC Income	\$50,001 - \$100,000	None
Wells Fargo Personal Checking and Savings Account, Washington, DC, USA	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
West Penn Realty ⇒ Eastgate Shopping Center LOCATION: Greensburg, PA, US		\$1,001 - \$15,000	Partnership Income	\$201 - \$1,000	\$201 - \$1,000
West Penn Realty ⇒ Fort Findlay Village LOCATION: Findlay, OH, US		\$50,001 - \$100,000	None		
West Penn Realty ⇒ West Town Center LOCATION: Cincinnati, OH, US		\$1,001 - \$15,000	Partnership Income	\$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
US Department of State	Salary	N/A	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Washington Strategy Group	Salary	\$62,925	N/A
US House of Representatives	Sp Sal	N/A	N/A
Carnegie Mellon University (Heinz School)	Salary	\$1,000	N/A
Ploughshares Fund	Salary	N/A	\$35,729

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Columbia Bank	2013	LOC - Rental	\$100,001 - \$250,000
JT	Columbia Bank	2014	LOC - Primary	\$100,001 - \$250,000
JT	Columbia Bank	2013	Mortgage - Rental Property	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Long Range Planning Committee (Chevy Chase, MD)

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Deloitte Consulting (Roslyn, VA, US)	Foreign Policy Consulting
Ploughshares Fund (Washington, DC, US)	Foreign Policy Consulting

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> ETrade Roth IRA (Owner: SP) Maryland College Investment Plan - DC1 (Owner: JT) LOCATION: MD DESCRIPTION: College Savings Plans of Maryland. Maryland College Investment Plan - DC2 (Owner: JT)
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LOCATION: MD

DESCRIPTION: College Savings Plan of Maryland.

- o Maryland College Investment Plan - DC3 (Owner: JT)

LOCATION: MD

DESCRIPTION: College Savings Plan of Maryland.

- o Maryland College Savings - Prepaid College Trust DC1 (Owner: JT)

LOCATION: MD

- o Maryland College Savings - Prepaid College Trust DC2 (Owner: JT)

LOCATION: MD

- o Maryland College Savings - Prepaid College Trust DC3 (Owner: JT)

LOCATION: MD

- o Snowden Lane Partners

DESCRIPTION: Retirement Account.

- o Snowden Lane Partners ⇒ AXA Accumulator Plus (NQ)

- o Snowden Lane Partners ⇒ Roth IRA

- o Vanguard 403(b)(7)

- o West Penn Realty

LOCATION: US

DESCRIPTION: Privately Held Real Estate Holding Partnership.

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: Joel Martin Rubin , 12/30/2015