



Filing ID #10055534

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: MD06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 01/16/2024
Period Covered: 01/01/2022– 12/18/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab ⇒ Roth IRA (SP) ⇒ IRA Rollover [IH]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab ⇒ Schwab ⇒ Retirement [MF]		\$100,001 - \$250,000	Tax-Deferred		
ETrade Roth IRA ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Autodesk, Inc. (ADSK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Coinbase Global, Inc. - Class A (COIN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Google Inc. - Common Stock Ex-Distribution When Issued (GOOAV) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Meta Platforms, Inc. - Class A (META) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ETrade Roth IRA ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Oracle Corporation Ordinary Shares (OCLCF) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Salesforce, Inc. (CRM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Tesla, Inc. (TSLA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Vanguard Total World Stock Index ETF (VT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
ETrade Roth IRA ⇒ Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
First National Bank - Business Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
First National Bank - Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Maryland College Investment Plan - DC1 ⇒ Portfolio 2028 [5P]	JT	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: MD					
Maryland College Investment Plan - DC2 ⇒ Portfolio 2025 [5P]	JT	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: MD					
Maryland College Investment Plan - DC3 ⇒ Portfolio 2024 [5P]	JT	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: MD					
Maryland College Savings - Prepaid College Trust DC1 ⇒ Portfolio 2024 [5P]	JT	\$50,001 - \$100,000	Tax-Deferred		
LOCATION: MD					
Maryland College Savings - Prepaid College Trust DC3 ⇒ Portfolio 2027 [5P]	JT	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: MD					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Maryland College Savings - Prepaid College Trust DC3 ⇒ Portfolio 2030 [5P]	JT	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: MD					
Rental Property [RP]	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Washington, DC, US					
Rental Property [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: East Palo Alto, CA, US					
Roth IRA ⇒ Roth IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Roth IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Roth IRA - Child [IH]		\$1,001 - \$15,000	Tax-Deferred		
State of Israel Bond [GS]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
TIAA [PE]		\$1,001 - \$15,000	Tax-Deferred		
U.S. Senate Federal Credit Union [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Vanguard 403(b)(7) ⇒ Vanguard Developed Markets Index Fund AD [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard 403(b)(7) ⇒ Vanguard Total Bond Market Index Adm [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard 403(b)(7) ⇒ Vanguard Total Stock Market Index Adm [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo - WSG Checking and Savings Accounts, Washington, DC, USA [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo Personal Checking and Savings Account, Washington, DC, USA [BA]	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
Wells Fargo Personal Checking and Savings Account, Washington, DC, USA [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo Personal Checking and Savings Account, Washington, DC, USA [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo Personal Checking and Savings Account, Washington, DC, USA [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
West Penn Realty ⇒ Eastgate Shopping Center [RP] LOCATION: Greensburg, PA, US		\$1,001 - \$15,000	Partnership Income	\$201 - \$1,000	\$201 - \$1,000
West Penn Realty ⇒ Waverly Plaza Shopping Center [RP] LOCATION: Lansing, MI, US		\$1,001 - \$15,000	Partnership Income	\$1 - \$200	\$1 - \$200
West Penn Realty ⇒ West Town Center [RP] LOCATION: Cincinnati, OH, US		\$1,001 - \$15,000	Partnership Income	\$1 - \$200	\$1 - \$200

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Washington Strategy Group COMMENTS: This is the total WSG revenue for 2022.	WSG Revenue	N/A	\$175,000.00
Hedera	Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	USSFCU	2016	Line of Credit	\$15,001 - \$50,000
JT	First National Bank	2021	HELOC	\$250,001 - \$500,000
JT	Newrez	2019	Mortgage (Rental)	\$500,001 - \$1,000,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	First National Bank	2021	Line of Credit	\$250,001 - \$500,000
JT	USSFCU	2023	Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Council Member	Town of Chevy Chase, MD
Senior Director	Transnational Strategy Group
Partner	Democracy Partners
Strategic Advisor	Valcour, LLC
Board Member	Alliance for Peacebuilding

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Charles Schwab
DESCRIPTION: Retirement Account.
- Charles Schwab ⇒ Roth IRA (SP)
- Charles Schwab ⇒ Schwab
- 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)
LOCATION: MD
DESCRIPTION: College Savings Plan of Maryland.
- Maryland College Investment Plan - DC3 (Owner: JT)
LOCATION: MD
DESCRIPTION: College Savings Plan of Maryland.
- Maryland College Savings - Prepaid College Trust DC1 (Owner: JT)
LOCATION: MD
- Maryland College Savings - Prepaid College Trust DC3 (Owner: JT)

LOCATION: MD

- Roth IRA
- Vanguard 403(b)(7)
- 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 , 01/16/2024