



Filing ID #10058815

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Sarah Elaine Albertson-Corkery  
**Status:** Congressional Candidate  
**State/District:** IA02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 06/14/2024  
**Period Covered:** 01/01/2023– 05/15/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital One Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Corkery Creative, LLC [OL]  LOCATION: Cedar Falls, IA, US DESCRIPTION: Creative design services	SP	\$1 - \$1,000	Business income	\$15,001 - \$50,000	\$15,001 - \$50,000
Fidelity Simple IRA ⇒ Fidelity Advisor Freedom 2040 Fund: Class Z6 (FKGLX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Fidelity Simple IRA ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Iowa 529 College Savings Plan DC1 ⇒ Aggressive Growth Age-Based Track: Blended Aggressive Growth Portfolio [5P]  LOCATION: IA		\$15,001 - \$50,000	Tax-Deferred		
Iowa 529 College Savings Plan DC1 ⇒ Aggressive Growth Age-Based Track: Blended Aggressive Growth Portfolio [5P]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: IA					
Iowa 529 College Savings Plan DC2 ⇒ Growth Age-Based Track: Blended Moderate Growth Portfolio [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: IA					
Iowa 529 College Savings Plan DC2 ⇒ Growth Age-Based Track: Blended Moderate Growth Portfolio [5P]		\$15,001 - \$50,000	Tax-Deferred		
LOCATION: IA					
Iowa 529 College Savings Plan DC3 ⇒ Aggressive Growth Age-Based Track: Moderate Growth Portfolio [5P]	SP	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: IA					
Iowa 529 College Savings Plan DC3 ⇒ Growth Age-Based Track: Conservative Growth Portfolio [5P]	SP	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: IA					
Iowa 529 College Savings Plan DC3 ⇒ Growth Age-Based Track: Conservative Growth Portfolio [5P]		\$15,001 - \$50,000	Tax-Deferred		
LOCATION: IA					
Schwab IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ DFA Emerging Markets Portfolio I (DFEMX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Emerging Markets Small Cap Portf (DEMSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Emerging Markets Value Portfolio (DFEVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DFA Emerging Markets Value Portfolio (DFEVX) [MF]					
Schwab IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Real Estate Securities Ptf (DFITX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Real Estate Securities Ptf (DFITX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Small Cap Value Portfolio (DISVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Value Portfolio (DFIVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Value Portfolio (DFIVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ DFA Large Cap International Portfolio (DFALX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Real Estate Securities Portfolio (DFREX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA Real Estate Securities Portfolio (DFREX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Small Cap Portfolio (DFSTX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Large Cap Value Portfolio (DFLVX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Micro Cap Portfolio (DFSCX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ DFA US Large Company Portfolio (DFUSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ FDIC Insured Bank Account [BA]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ Schwab Bank Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab Joint Brokerage Account ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000
Schwab Joint Brokerage Account ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Joint Brokerage Account ⇒ FDIC Insured Bank Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DFA Emerging Markets Portfolio I (DFEMX) [MF]					
Schwab Roth IRA ⇒ DFA Emerging Markets Small Cap Portf (DEMSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA Emerging Markets Value Portfolio (DFEVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Veridian Credit Union Accounts [BA]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

\* Investment vehicle 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
Veridian Credit Union	Salary; Separation Agreement	\$49,160.01	\$250,039.81
Corkery Creative, LLC	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Chief Marketing Officer	Corkery Creative LLC
Board member	Beau’s Beautiful Blessings
Director	Veridian Insurance
Commissioner	Cedar Falls Parks & Recreation
Board member	Inclusion Connection

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
July 2023	Myself, Veridian Credit Union	Confidential agreement related to separation benefits

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>◦ Fidelity Simple IRA (Owner: SP)</li><li>◦ Iowa 529 College Savings Plan DC1 (Owner: SP) LOCATION: IA</li><li>◦ Iowa 529 College Savings Plan DC1 LOCATION: IA</li><li>◦ Iowa 529 College Savings Plan DC2 (Owner: SP) LOCATION: IA</li><li>◦ Iowa 529 College Savings Plan DC2 LOCATION: IA</li><li>◦ Iowa 529 College Savings Plan DC3 (Owner: SP) LOCATION: IA</li><li>◦ Iowa 529 College Savings Plan DC3 LOCATION: IA</li><li>◦ Schwab IRA (Owner: SP)</li><li>◦ Schwab IRA</li><li>◦ Schwab Joint Brokerage Account (Owner: JT) LOCATION: US</li><li>◦ Schwab Roth IRA (Owner: SP)</li><li>◦ Schwab Roth IRA</li></ul>
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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:** Sarah Elaine Albertson-Corkery , 06/14/2024