



Filing ID #10062406

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Jennifer Pilchick Perelman  
**Status:** Congressional Candidate  
**State/District:** FL25

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 07/13/2024  
**Period Covered:** 01/01/2023– 06/14/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset      | Income Type(s) | Income<br>Current Year to<br>Filing | Income<br>Preceding<br>Year |
|---|-------|---------------------|----------------|-------------------------------------|-----------------------------|
| Charles Schwab Brokerage account [OT]<br>DESCRIPTION: schwab brokerage account  | JT    | \$1,001 - \$15,000  | Dividends      | \$201 - \$1,000                     | None                        |
| Charles Schwab Money Market [BA]  | JT    | \$1,001 - \$15,000  | Dividends      | \$1 - \$200                         | \$1 - \$200                 |
| Graham UTMA at CNB ⇒<br>CNNR MUNI High INC SERV [FN]  | DC    | \$1,001 - \$15,000  | Interest       | \$201 - \$1,000                     | None                        |
| Graham UTMA at CNB ⇒<br>Ishares Core S&P500 [EF]  | DC    | \$15,001 - \$50,000 | Dividends      | \$201 - \$1,000                     | \$1 - \$200                 |
| Graham UTMA at CNB ⇒<br>iShares Dow Jones U.S. ETF (IYY) [EF]   | DC    | \$1,001 - \$15,000  | Dividends      | \$201 - \$1,000                     | Not<br>Applicable           |
| Graham UTMA at CNB ⇒<br>Ishares Russell 3000 [MF]   | DC    | \$15,001 - \$50,000 | Dividends      | \$201 - \$1,000                     | \$201 -<br>\$1,000          |
| Michigan Education Savings Program ⇒ Aggressive<br>Age Based Option 18 ⇒<br>Aggressive Age Based Option 18 [5P]<br>LOCATION: MI | DC    | \$1,001 - \$15,000  | None           |                                     |                             |

| Asset  | Owner | Value of Asset        | Income Type(s) | Income<br>Current Year to<br>Filing | Income<br>Preceding<br>Year |
|--|-------|-----------------------|----------------|-------------------------------------|-----------------------------|
| Michigan Education Savings Program ⇒ Balanced Option ⇒<br>Balanced Option [5P]<br><br>LOCATION: FL                               | DC    | \$1,001 - \$15,000    | None           |                                     |                             |
| Michigan Education Savings Program ⇒ Principal Plus Interest ⇒<br>Principal plus Interest Option [5P]<br><br>LOCATION: MI        | DC    | \$1,001 - \$15,000    | None           |                                     |                             |
| Outpatient Surgical Services [PS]<br><br>DESCRIPTION: Shares in a surgery center   | JT    | \$100,001 - \$250,000 | Dividends      | \$15,001 - \$50,000                 | \$15,001 - \$50,000         |
| Precision Lithotripsy [OL]<br><br>LOCATION: Broward County, FL, US<br>DESCRIPTION: Shares in a Partnership for a surgical device | SP    | \$15,001 - \$50,000   | Dividends      | \$5,001 - \$15,000                  | \$5,001 - \$15,000          |
| retirement account [OT]<br><br>DESCRIPTION: 401K   | SP    | \$250,001 - \$500,000 | Tax-Deferred   |                                     |                             |
| Schwab IRA ⇒<br>AMG MANAGERS EMRG (MMCFX) [MF]   |       | \$1,001 - \$15,000    | Tax-Deferred   |                                     |                             |
| Schwab IRA ⇒<br>Invesco Technology FTCHX [MF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |                                     |                             |
| Schwab IRA ⇒<br>Janus Henderson Enterprise JAENX [MF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |                                     |                             |
| Schwab IRA ⇒<br>Janus Henderson Forty JACTX [MF]   |       | \$15,001 - \$50,000   | Tax-Deferred   |                                     |                             |
| Schwab IRA ⇒<br>Janus Henderson GLBL Life JAGLX [MF]   |       | \$1,001 - \$15,000    | Tax-Deferred   |                                     |                             |
| Schwab IRA ⇒<br>Janus Henderson Growth JAGIX [MF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |                                     |                             |
| Vaughan Medical [OL]<br><br>LOCATION: Broward, FL, US  |       | \$15,001 - \$50,000   | Dividends      | \$5,001 - \$15,000                  | \$5,001 - \$15,000          |

| Asset                                  | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|----------------|-------------------------------|-----------------------|
| DESCRIPTION: Medical Procedure Company |       |                     |                |                               |                       |
| Walt Disney Company (DIS) [ST]         | DC    | \$1 - \$1,000       | Dividends      | \$1 - \$200                   | \$1 - \$200           |
| Wells Fargo [BA]                       | JT    | \$15,001 - \$50,000 | None           |                               |                       |

\* 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 |
|--------------------------|-------------------------------------|-------------------------------|-----------------------|
| GenesisCare              | Spouse Salary                       | \$447,475.00                  | \$396,174.00          |
| Vaughan Medical          | dividend from llc                   | \$4,000.00                    | \$6,852.00            |
| Sunshine state (CENTENE) | spouse payment for physician review | \$3,600.00                    | \$3,600.00            |
| spouse                   | legal case review                   | \$.00                         | \$5,000.00            |

### SCHEDULE D: LIABILITIES

| Owner | Creditor                 | Date Incurred | Type          | Amount of Liability   |
|-------|--------------------------|---------------|---------------|-----------------------|
| SP    | Bankers Healthcare Group | 2022          | Business loan | \$100,001 - \$250,000 |
|       | American Express         | revolving cc  | Credit card   | \$50,001 - \$100,000  |

### 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 INVESTMENT VEHICLE DETAILS

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- Graham UTMA at CNB (Owner: DC)  
DESCRIPTION: UTMA Graham Account managed by City National Bank
- Michigan Education Savings Program (Owner: DC)  
LOCATION: MI
- Michigan Education Savings Program ⇒ Aggressive Age Based Option 18 (Owner: DC)  
LOCATION: MI
- Michigan Education Savings Program ⇒ Balanced Option (Owner: DC)  
LOCATION: MI
- Michigan Education Savings Program ⇒ Principal Plus Interest (Owner: DC)  
LOCATION: MI
- Schwab IRA

## 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:** Jennifer Pilchick Perelman , 07/13/2024