



Filing ID #10056958

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Terris Eugene Todd
Status: Congressional Candidate
State/District: VA07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 04/18/2024
Period Covered: 01/01/2023– 04/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Heritage Foundation 403B Plan ⇒ Artisan International Value Fund Investor Shs (ARTKX) [MF] DESCRIPTION: This was liquidated account and distributions are reported on Schedule C		\$1,001 - \$15,000	Tax-Deferred		
Heritage Foundation 403B Plan ⇒ Loomis Sayles Funds - Bond Fund Institutional Class (LSBDX) [MF] DESCRIPTION: This was a liquidated account. Distributions are reported in Schedule C.		\$1,001 - \$15,000	Tax-Deferred		
Heritage Foundation 403B Plan ⇒ Oakmark Fund Investor Class (OAKMX) [MF] DESCRIPTION: This was a liquidated account. Distributions are reported in Schedule C.		\$1,001 - \$15,000	Tax-Deferred		
Heritage Foundation 403B Plan ⇒ Oakmark Global Fund Investor Class (OAKGX) [MF] DESCRIPTION: This was a liquidated account. Distributions are reported in Schedule C.		\$1,001 - \$15,000	Tax-Deferred		
Heritage Foundation 403B Plan ⇒ Templeton Global Bond Fund Advisor Class (TGBAX) [MF] DESCRIPTION: This was a liquidated account. Distributions are reported in Schedule C.		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Single Family Home [RP]		\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	\$2,501 - \$5,000
LOCATION: Battle Creek, MI, US					

* 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
The Heritage Foundation	Full-time employment salary	\$.00	\$111,327.22
Western Michigan University	Spouse Salary	N/A	N/A
Heritage Foundation 403B Plan	Disbursement	\$14,978.83	N/A
Community Action Agency 401k Plan	Disbursement	\$27,327.57	N/A
Battle Creek Public Schools 403B	Disbursement	N/A	\$17,625.00
The Principal Bank	Disbursement	N/A	\$2,659.69

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Blue Ox Credit Union	October 2020	Mortgage - Rental	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors	Norfolk State University Foundation
Board Member	SW Michigan Urban League
Board Member	CFADD

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2024	Battle Creek Public Schools	Managed Retirement Account Balance \$2,202.43

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<div><div>◦</div><div>Heritage Foundation 403B Plan</div><div>DESCRIPTION: Employer Retirement Plan</div></div>

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: Terris Eugene Todd , 04/18/2024