



Filing ID #10056958

# FINANCIAL DISCLOSURE REPORT

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## 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]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: This was liquidated account and distributions are reported on Schedule C					
Heritage Foundation 403B Plan ⇒ Loomis Sayles Funds - Bond Fund Institutional Class (LSBDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: This was a liquidated account. Distributions are reported in Schedule C.					
Heritage Foundation 403B Plan ⇒ Oakmark Fund Investor Class (OAKMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: This was a liquidated account. Distributions are reported in Schedule C.					
Heritage Foundation 403B Plan ⇒ Oakmark Global Fund Investor Class (OAKGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: This was a liquidated account. Distributions are reported in Schedule C.					
Heritage Foundation 403B Plan ⇒ Templeton Global Bond Fund Advisor Class (TGBAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: This was a liquidated account. Distributions are reported in Schedule C.					

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	\$0.00	\$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

April 2024

Heritage Foundation

Managed Retirement Account Balance \$2,600.62

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

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Heritage Foundation 403B Plan  
DESCRIPTION: Employer Retirement Plan

## 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