



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

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

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

- 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