



Filing ID #10062537

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Peter Barca  
**Status:** Congressional Candidate  
**State/District:** WI01

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2024  
**Filing Date:** 07/24/2024  
**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
501(c)(3) Equi-Vest [5F]  LOCATION: IL		\$50,001 - \$100,000	Tax-Deferred		
Abbott Laboratories Common Stock (ABT) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
AbbVie Inc. Common Stock (ABBV) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
America Movil, S.A.B. de C.V. American Depositary Shares (AMX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
American Family [WU]	SP	\$1,001 - \$15,000	None		
Archer-Daniels-Midland Company Common Stock (ADM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Boeing Company (BA) [ST]		\$50,001 - \$100,000	None		
Bristol-Myers Squibb Company Common Stock (BMY) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Caterpillar, Inc. Common Stock (CAT) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Caterpillar, Inc. Common Stock (CAT) [ST]		\$25,000,001 - \$50,000,000	Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
Chase Bank [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Chevron Corporation Common Stock (CVX) [ST]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Chevron Corporation Common Stock (CVX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Cisco Systems, Inc. - Common Stock (CSCO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Citigroup, Inc. Common Stock (C) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DAIMLER TRUCK HLDG S/ADR (DTRUY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Deere & Company Common Stock (DE) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Edison International Corporate Bond [CS]		Over \$50,000,000	Capital Gains, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: This is a corporate bond that pays upon sale.					
Eli Lilly and Company Common Stock (LLY) [ST]		\$100,001 - \$250,000	None		
Empower WI Deferred Compensation [AB]	JT	\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Expedia Group Inc [CS]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: This is a corporate bond that pays upon sale.					
Exxon Mobil Corporation Common Stock (XOM) [ST]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Federal Government Thrifty Savings Plan [PE]		\$100,001 - \$250,000	Single Life Annuity	None	None
Fidelity Puritan Fund (FPURX) [MF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
GSK PLC (GLAXF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Haleon plc American Depositary Shares (HLN) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Intel Corporation - Common Stock (INTC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
International Business Machines Corporation Common Stock (IBM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
John Hancock Fundamental Large Cap Core Fund Class A (TAGRX) [MF]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
John Hancock Fundamental Large Cap Core Fund Class A (TAGRX) [MF]		\$15,001 - \$50,000	Capital Gains	\$1 - \$200	\$1 - \$200
John Hancock Life [WU]		\$15,001 - \$50,000	None		
Johnson & Johnson Common Stock (JNJ) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
McDonald's Corporation Common Stock (MCD) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
MERCEDES BENZ GROUP AG (MBGAF) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Merck & Company, Inc. Common Stock (MRK) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley [5F]		\$1,001 - \$15,000	None		
LOCATION: WI					
DESCRIPTION: 429 College Fund for my Grandson Connor Barca Wiesman					
North Shore Bank [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Occidental Petroleum Corporation Common Stock (OXY) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Occidental Petroleum Corporation Warrants (OXY.W) [ST]		\$1 - \$1,000	None		
Organon & Co. Common Stock (OGN) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
PepsiCo, Inc. - Common Stock (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Philip Morris International Inc Common Stock (PM) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
PNC Financial Services Group, Inc. (PNC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Texas Instruments Incorporated - Common Stock (TXN) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
The Travelers Companies, Inc. Common Stock (TRV) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TruStone Financial [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Verizon Communications Inc. Common Stock (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Walmart Inc. Common Stock (WMT) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Warner Bros. Discovery, Inc. - Series A Common Stock (WBD) [ST]		\$1,001 - \$15,000	None		
WEC Energy Group, Inc. Common Stock (WEC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

\* 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
Wisconsin Department of Revenue	Salary as Secretary of Revenue	\$46,500.00	\$158,500.00
Wisconsin Retirement System	Spouse Retirement Income	\$39,425.00	\$72,720.00
Wisconsin Retirement Income	Retirement Income for Self	\$12,400.00	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	October of 2013	Mortgage	\$15,001 - \$50,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
President	Federation of Tax Administrators
COMMENTS: President of the National Association of Revenue Departments	
Board Member	ETAAC - IRS Advisory Committee on Electronic Tax Administration

### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## **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:** Peter Barca , 07/24/2024