



Filing ID #10055164

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Becky Edwards  
**Status:** Congressional Candidate  
**State/District:** UT02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 08/30/2023  
**Period Covered:** 01/01/2022– 08/29/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401(k) John Edwards ⇒ Mountain Orthopaedics 401(k) [MF]  DESCRIPTION: 401(k) of spouse.	SP	\$50,001 - \$100,000	Tax-Deferred		
Government Fund (AABXX) [MF]  DESCRIPTION: Cash & Equivalents investment		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Mountain West Surgical Center LLC [OL]  LOCATION: Bountiful/Davis, UT, US DESCRIPTION: Spouse's ownership in a surgical center.	SP	\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
My529-Utah Educational Savings Plan ⇒ My529-Utah Educational Savings Plan [5P]  LOCATION: UT		\$100,001 - \$250,000	Tax-Deferred		
Rebecca Edwards IRA ⇒ SEI Private Trust Company - Roth IRA and IRA [IH]  DESCRIPTION: IRA		\$50,001 - \$100,000	Tax-Deferred		
Rebecca Edwards IRA ⇒ Rebecca Edwards IRA		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
⇒ Government Fund AABXX [MF] DESCRIPTION: Cash & Equivalents investment, part of IRA					
Rebecca Edwards IRA ⇒ Rebecca Edwards Roth IRA ⇒ Government Fund AABXX [MF] DESCRIPTION: Cash & Equivalents investment, Roth IRA		\$1 - \$1,000	Tax-Deferred		
Rebecca Edwards IRA ⇒ Rebecca Edwards Roth IRA ⇒ Vanguard Emerging Markets Stock Index Fund/United States [MF] DESCRIPTION: International Equity investment, part of Roth IRA		\$15,001 - \$50,000	Tax-Deferred		
Rebecca Edwards IRA ⇒ Rebecca Edwards Roth IRA ⇒ Vanguard Total Stock Market Index Fund [MF] DESCRIPTION: Domestic Equity investment, part of Roth IRA		\$50,001 - \$100,000	Tax-Deferred		
RENMED LLC, 5% Interest [OL] LOCATION: Bountiful/Davis, UT, US DESCRIPTION: Real estate investment in commercial office building.	SP	\$50,001 - \$100,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
RevRoad Capital [HE] DESCRIPTION: This is a private equity fund for which a \$200,000 commitment to RevRoad Capital Fund has been signed, but only \$40,000 has been invested so far. The remainder will be invested by end of 2023.		\$100,001 - \$250,000	Capital Gains	None	None
RevRoad LLC [PS] DESCRIPTION: This is RevRoad private company stock which was just signed on to in June 2023.		\$15,001 - \$50,000	Dividends	None	None
SEI Private Trust Company -- IRA ⇒ American - The Growth Fund of America [IH] DESCRIPTION: Domestic Equity investment, part of spouse IRA.	SP	\$50,001 - \$100,000	Tax-Deferred		
SEI Private Trust Company -- IRA ⇒ American Funds International Vantage Fund [MF] DESCRIPTION: International Equity investment, part of spouse IRA	SP	\$15,001 - \$50,000	Tax-Deferred		
SEI Private Trust Company -- IRA ⇒ Berkshire Hathaway Inc [MF] DESCRIPTION: Domestic Equity investment, part of spouse IRA	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SEI Private Trust Company -- IRA ⇒ Bluerock Total Income+ Real Estate Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Global Equity investment, part of spouse IRA					
SEI Private Trust Company -- IRA ⇒ Fidelity Global ex US Index Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: International Equity investment, part of spouse IRA					
SEI Private Trust Company -- IRA ⇒ Franklin DynaTech Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse IRA					
SEI Private Trust Company -- IRA ⇒ Franklin Income Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Multi-Asset investment, part of spouse IRA					
SEI Private Trust Company -- IRA ⇒ Franklin Small-Mid Cap Growth Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse IRA					
SEI Private Trust Company -- IRA ⇒ Government Fund AABXX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Cash & Equivalents investment, part of spouse IRA					
SEI Private Trust Company -- IRA ⇒ T Rowe Price Equity Index 500 Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse IRA					
SEI Private Trust Company -- IRA ⇒ The Private Shares Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse IRA					
SEI Private Trust Company -- IRA ⇒ Variant Alternative Income Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Alternative investment, part of spouse IRA					
SEI Private Trust Company -- Roth IRA ⇒ Airbnb Inc [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse IRA					
SEI Private Trust Company -- Roth IRA ⇒ Alphabet Inc [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse IRA					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SEI Private Trust Company -- Roth IRA ⇒ Amazon.com Inc [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse IRA					
SEI Private Trust Company -- Roth IRA ⇒ American - The Growth Fund of America [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse IRA					
SEI Private Trust Company -- Roth IRA ⇒ American Funds International Vantage Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: International Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ American Mutual Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ Apple Inc [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ Applied Digital Corp [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ Berkshire Hathaway Inc [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ Capital One Financial Corp [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ Datadog Inc [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ Exact Sciences Corp [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ Fidelity Global ex US Index Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: International Equity investment, part of spouse Roth IRA					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
SEI Private Trust Company -- Roth IRA ⇒ <b>Franklin DynaTech Fund [MF]</b>	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>Franklin Small-Mid Cap Growth Fund [MF]</b>	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>Government Fund AABXX [MF]</b>	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Cash & Equivalents investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>JPMorgan Chase &amp; Co [MF]</b>	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>Microsoft Corp [MF]</b>	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>Paypal Holdings Inc [MF]</b>	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>Shopify Inc [MF]</b>	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: International Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>SL Green Realty Corp [MF]</b>	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>Snowflake Inc CL A [MF]</b>	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>T Rowe Price Equity Index 500 Fund [MF]</b>	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ <b>Teladoc Health Inc [MF]</b>	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SEI Private Trust Company -- Roth IRA ⇒ Trade Desk Inc/The [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ VeriSign Inc [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA ⇒ Zions Bancorp NA [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Domestic Equity investment, part of spouse Roth IRA					
SEI Private Trust Company -- Roth IRA and IRA [IH]	SP	\$1,000,001 - \$5,000,000	Tax-Deferred		
DESCRIPTION: Spouse IRA.					
Vanguard 500 Index Fd Admiral Shs [MF]		\$1,000,001 - \$5,000,000	Interest	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000

\* Asset class 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
John C. Edwards MD Inc.	Spouse salary	\$45,000.00	\$89,000.00
John C. Edwards MD Inc.	Spouse employment	\$80,000.00	\$67,657.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Murdock Auto of Logan	January 2021	Auto lease	\$15,001 - \$50,000
SP	Audi Financial Services	June 2023	Auto lease	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Officer	John C. and Rebecca P. Edwards Family Foundation

Position	Name of Organization
Board Member	Utah Clean Energy
Board Member	Utah Women Run

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- 401(k) John Edwards (Owner: SP)  
DESCRIPTION: Defined Contribution Pension Plan
- My529-Utah Educational Savings Plan  
LOCATION: UT  
DESCRIPTION: Educational savings plan for dependents.
- Rebecca Edwards IRA
- Rebecca Edwards IRA ⇒ Rebecca Edwards IRA
- Rebecca Edwards IRA ⇒ Rebecca Edwards Roth IRA
- SEI Private Trust Company -- IRA (Owner: SP)  
DESCRIPTION: This is the IRA for John, spouse.
- SEI Private Trust Company -- Roth IRA (Owner: SP)  
DESCRIPTION: This is the Roth IRA for John, spouse.

## 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:** Becky Edwards , 08/30/2023