



Filing ID #10062879

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Jody Marie Puffett  
**Status:** Congressional Candidate  
**State/District:** IA02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 09/5/2024  
**Period Covered:** 01/01/2023– 04/5/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Transamerica 401(k) Retirement Savings Plan ⇒ Atlanta Capital High Quality SMID Sep Account [OT]  DESCRIPTION: Atlanta Capital High Quality SMID Sep Account		\$15,001 - \$50,000	Capital Gains	\$2,501 - \$5,000	\$2,501 - \$5,000
Transamerica 401(k) Retirement Savings Plan ⇒ Boston Partners Large Cap Value Equity Class D [OT]  DESCRIPTION: Boston Partners Large Cap Value Equity Class D		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Transamerica 401(k) Retirement Savings Plan ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$50,001 - \$100,000	Capital Gains	\$2,501 - \$5,000	\$5,001 - \$15,000
Transamerica 401(k) Retirement Savings Plan ⇒ MFS International Equity CIT Class 4 [OT]  DESCRIPTION: MFS International Equity CIT Class 4		None	Capital Gains	None	\$5,001 - \$15,000
Transamerica 401(k) Retirement Savings Plan ⇒		\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MFS International Equity Class 3A [OT]					
DESCRIPTION: MFS International Equity Class 3A					
Transamerica 401(k) Retirement Savings Plan ⇒ WTC-CIF II Growth (GRWTDX) [MF]		\$100,001 - \$250,000	Capital Gains	\$15,001 - \$50,000	\$100,001 - \$1,000,000

\* 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
Transamerica Life Insurance Company	Wages	N/A	\$50,934.62
CFO Systems	Wages	N/A	\$28,575.00
TriNet HR IV. LLC (Revol One Insurance Company)	Wages	\$155,099.58	N/A
UHY	Contractor Fees	\$13,252.50	\$8,602.50
State of Iowa	Child Maintenance Support Pmts	\$13,406.60	\$20,129.75

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	GNB Bank	4/1/2013	Primary Residence	\$100,001 - \$250,000
	GNB Bank	4/13/2018	Lake Delhi Lot	\$100,001 - \$250,000
	GNB Bank	5/6/2013	Farm LOC	\$100,001 - \$250,000
	GNB Bank	6/13/2022	LOC	\$100,001 - \$250,000
	SoFi Bank	10/13/2022	Personal Loan	\$15,001 - \$50,000
	Discover	Various	Credit Line	\$15,001 - \$50,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Director and Partner	Puffett Services, Inc
Chief Financial Officer	Revol One Insurance Company
Chief Financial Officer	Ibexis Life & Annuity Insurance Company
Contract CFO	CFO Systems
Contract CFO	UHY Advisors
Contract Finance Transformation Advisor	RSM
Contract CFO	SeatonHill

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2020	Transamerica Insurance Company and Jody Puffett	Retiree Health Benefits

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

Source (Name and Address)	Brief Description of Duties
CFO Systems (Omaha, NE, US)	Contract CFO
Transamerica Life Insurance Company (Cedar Rapids, IA, US)	Head of Finance and Actuarial Transformation
TriNet HR IV. LLC (Ibexis Life & Annuity Insurance Company (West Palm Beach, FL, US)	Chief Financial Officer
RSM US LLP (Davenport, IA, US)	Contract Finance Executive
TriNet HR IV. LLC (Revol One Insurance Company) (Wilmington , DE, US)	Chief Financial Officer
UHY Advisors (Farmington Hills, MI, US)	Contract CFO

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>Transamerica 401(k) Retirement Savings Plan</li></ul>
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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:** Jody Marie Puffett , 09/5/2024