



Filing ID #10061382

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Carl Bedell
Status: Congressional Candidate
State/District: VA07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/15/2024
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
American Express [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Chase Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
Citizens Bank [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Fidelity [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
IRA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ American Airlines Group, Inc. - Common Stock (AAL) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Bank of America Corporation Common Stock (BAC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Clear Secure, Inc. Class A Common Stock (YOU) [ST]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ Deere & Company Common Stock (DE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Fidelity Balanced Fund (FBALX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Fidelity Total Market Index Fund (FZROX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Fidelity ZERO Large Cap Index Fund (FNILX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ International Business Machines Corporation Common Stock (IBM) [ST]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ MercadoLibre, Inc. - Common Stock (MELI) [ST]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ Money Market [IH]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ Northrop Grumman Corporation Common Stock (NOC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Prudential Financial, Inc. Common Stock (PRU) [ST]					
IRA ⇒ Safety Shot, Inc. - Common Stock (SHOT) [ST]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ Southwest Airlines Company Common Stock (LUV) [ST]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ SRM Entertainment, Inc. - Common Stock (SRM) [ST]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ Teladoc Health, Inc. Common Stock (TDOC) [ST]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ United Security Bancshares, Inc. (USBI) [ST]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ Victory Aggressive Growth Fund Shares (USAUX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Victory Nasdaq-100 Index Fund Shares (USNQX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Rental Property [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Montgomery County, MD, US					
USAA [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200

* 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
ILION Management Strategies LLC	Employment	\$80,000.00	\$366,911.00
Bedell PLLC	Self-Employment	\$30,000.00	\$63,513.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Citizens Bank	January 2022	Mortgage - Rental Property	\$100,001 - \$250,000
	CENLAR	Oct 2023	Mortgage - 2nd Home	\$250,001 - \$500,000
	USAA	Nov 2022	Auto Loan	\$50,001 - \$100,000
	Planet Home Lending	Sep 2022	Home Mortgage	\$250,001 - \$500,000
	PenFed	May 2022	Auto Loan	\$15,001 - \$50,000
	Capital One	Feb 2024	Auto Loan	\$15,001 - \$50,000
	Chase Bank	Apr 2024	Credit Card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner	ILION Management Strategies LLC
Owner	Bedell PLLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
ILION Management Strategies (Arlington, VA, US)	Owner / Consultant

Source (Name and Address)	Brief Description of Duties
Bedell PLLC (Arlington, VA, US)	Owner / Lawyer

SCHEDULE A INVESTMENT VEHICLE DETAILS

- 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: Carl Bedell , 05/15/2024