



Filing ID #10055723

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Janelle Bynum  
**Status:** Congressional Candidate  
**State/District:** OR05

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 08/25/2023  
**Period Covered:** 01/01/2022– 07/31/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Boeing Employees' Credit Union Checking 51 [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Boeing Employees' Credit Union Savings 43 [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ 912797GE1 Treasury Bills [GS] DESCRIPTION: US Treasury BILL 02/01/2024	JT	\$50,001 - \$100,000	None		
Charles Schwab Brokerage ⇒ BAGIX BAIRD AGGREGATE BOND INST [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Charles Schwab Brokerage ⇒ BAGSX BAIRD AGGREGATE BOND INV [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Charles Schwab Brokerage ⇒ BAMBX BLACKROCK Systematic Multi-Strategy Fund Investor A Shares [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ BIMBX BLACKROCK Systematic Multi-Strategy Fund	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Institutional Shares [MF]					
DESCRIPTION: 2022 \$4223.69					
Charles Schwab Brokerage ⇒ Charles Schwab Bank [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ DBLTX DOUBLELINE TOTAL RETURN Bond [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Charles Schwab Brokerage ⇒ DFAU Dimensional US Core ETF [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Charles Schwab Brokerage ⇒ DLTNX DOUBLELINE TOTAL RETURN [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Charles Schwab Brokerage ⇒ GSIMX Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares [MF]	JT	\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
Charles Schwab Brokerage ⇒ PTIAX PERFORMANCE TRUST STRATEGIC [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Charles Schwab Brokerage ⇒ SCHG Schwab US Large Cap ETF [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ SDY SPDR S&P Dividend Fund ETF [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab Brokerage ⇒ SNOXX SCHWAB TREASURY OBLIG MONEY INV [OT]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
DESCRIPTION: Scwab treasury					
Charles Schwab Brokerage ⇒ SPYG SPDR S&P Growth ETF [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ VDIGX Vanguard Dividend Growth Fund Investor Shares [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab Brokerage ⇒ VIG VANGUARD DIVIDEND ETF [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab Brokerage ⇒	JT	\$100,001 -	Dividends	\$1,001 -	\$1,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VTI VANGUARD TOTAL STOCK ETF [EF]		\$250,000		\$2,500	\$2,500
Charles Schwab Brokerage ⇒ VXUS VANGUARD TOTAL INTERNTL ETF [EF] DESCRIPTION: 1196.78 2022 642.50 2023 ytd	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Embold Credit Union Checking [BA]	JT	\$1,001 - \$15,000	None		
Embold Credit Union Savings [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity IRA ⇒ Fidelity Freedom 2045 FFFGX [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity Govt Cash Reserves [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity MidCap Value [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity Select Const. & Housing [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity Select Leisure [MF]		\$15,001 - \$50,000	Tax-Deferred		
Ivory Coast Management LLC [OL]  LOCATION: Clackamas, OR, US DESCRIPTION: Restaurants	JT	\$5,000,001 - \$25,000,000	Operating Income	None	\$100,001 - \$1,000,000
JB Charles Schwab ⇒ JB Charles Schwab Bank [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
JB Charles Schwab ⇒ McDonald's Corporation (MCD) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
JB Charles Schwab ⇒ Nike, Inc. (NKE) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	None
JB Equitable ⇒ EQ Capital Group Research [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JB Equitable ⇒ EQ Clear Bridge Large Cap Growth ESG [MF]		\$1,001 - \$15,000	Tax-Deferred		
JB Equitable ⇒ EQ Large Cap Core Managed Volatility [MF]		\$1 - \$1,000	Tax-Deferred		
JB Equitable ⇒ EQ Moderate Allocation [MF]		\$1,001 - \$15,000	Tax-Deferred		
JB Equitable ⇒ EQ Quality Bond Plus [MF]		\$1,001 - \$15,000	Tax-Deferred		
JB Equitable ⇒ EQ Value Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		
JB Equitable ⇒ EQ/AB Small Cap Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/AB SMALL CAP GROWTH [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/CAPITAL GROUP RESEARCH [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/Common Stock Index [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/Core Plus Bond [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/Equity 500 Index [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/INTERNATIONAL EQUITY INDEX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/INTERNATIONAL VALUE MANAGED VOLATILITY [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/LARGE CAP GROWTH MANAGED VOLATILITY [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MJB Equitable ⇒ EQ/LARGE CAP VALUE MANAGED VOLATILITY [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/MID CAP VALUE MANAGED VOLATILITY [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/Moderate Allocation [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ EQ/VALUE EQUITY [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
MJB Equitable ⇒ Multimanager Aggressive Equity [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Oregon College Savings Plan DC1 ⇒ College Enrollment Year 2038 [MF] DESCRIPTION: Dependent Child 1 529 Plan		\$15,001 - \$50,000	Tax-Deferred		
Oregon College Savings Plan DC2 ⇒ College Enrollment Year 2022 [MF] DESCRIPTION: Dependent Child 2 529 Plan		\$15,001 - \$50,000	Tax-Deferred		
Oregon College Savings Plan DC3 ⇒ College Enrollment Year 2027 [MF] DESCRIPTION: Dependent Child 3 529 plan		\$15,001 - \$50,000	Tax-Deferred		
Oregon College Savings Plan DC4 ⇒ College Enrollment Year 2028 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Oregon Savings Growth Plan ⇒ Lifepath 2035 Fund [MF] DESCRIPTION: Oregon Savings Growth Plan		\$15,001 - \$50,000	Tax-Deferred		
Oregon Savings Growth Plan ⇒ LifePath 2040 Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
WF Checking [BA]	JT	\$1,001 - \$15,000	None		
WF Checking DC1 [BA]	DC	\$1,001 - \$15,000	None		
WF Checking DC2 [BA]	DC	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
WF Checking DC3 [BA]	DC	\$1 - \$1,000	None		
WF Checking DC4 [BA]	DC	\$1,001 - \$15,000	None		
WF Savings [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
WF Savings DC1 [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
WF Savings DC2 [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
WF Savings DC3 [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
WF Savings DC4 [BA]	DC	\$1,001 - \$15,000	None		

\* 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
State of Oregon	Legislative Salary	\$51,213.00	\$38,981.60
Ivory Coast Management	Salary	\$63,333.28	\$94,999.92
Ivory Coast Management	Spouse Salary	N/A	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bremer Bank	Jan 2022	Renovation Happy Valley	\$250,001 - \$500,000
	American Express	July 2023	Revolving Line of Credit	\$10,000 - \$15,000
	Boeing Employees' Credit Union Visa	July 2023	Revolving Credit	\$10,000 - \$15,000
JT	Bremer Bank	December 2022	Renovation JC	\$500,001 - \$1,000,000
JT	Bremer Bank	January 2021	Renovation Portland	\$100,001 -

Owner	Creditor	Date Incurred	Type	Amount of Liability
				\$250,000
	Bremer Bank	April 2022	Vehicle	\$50,001 - \$100,000
SP	American Express	September 2022	Revolving Line of Credit	\$15,001 - \$50,000
JT	Northwest Federal Credit Union	July 2021	Auto Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Grand Central Bakery
Board Member	Business Oregon
COMMENTS: State commission on business 2017-2023 (No longer on commission)	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
2023	Myself and the State of Oregon	Continued participation in Legislative Retirement Plan

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

Source (Name and Address)	Brief Description of Duties
Grand Central Bakery (Portland, OR, US)	Board Member 2022
COMMENTS: \$12,500	

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>Charles Schwab Brokerage (Owner: JT) LOCATION: Happy Valley, OR, US</li><li>Fidelity IRA DESCRIPTION: Fidelity Simple IRA</li><li>JB Charles Schwab LOCATION: Happy Valley, OR, US DESCRIPTION: JB Charles Schwab Acct</li><li>JB Equitable DESCRIPTION: AXA plan</li><li>MJB Equitable (Owner: SP) DESCRIPTION: AXA Plan</li></ul>
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- Oregon College Savings Plan DC1  
LOCATION: OR
- Oregon College Savings Plan DC2  
LOCATION: OR
- Oregon College Savings Plan DC3  
LOCATION: OR
- Oregon College Savings Plan DC4  
LOCATION: OR
- Oregon Savings Growth Plan  
DESCRIPTION: State of Oregon Retirement Act

## 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:** Janelle Bynum , 08/25/2023