



Filing ID #10055212

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Gerry W. Leonard Jr.
Status: Congressional Candidate
State/District: RI01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 07/7/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Navy Federal Checking [BA]		\$1,001 - \$15,000	None		
Navy Federal Checking [BA]	SP	\$100,001 - \$250,000	None		
Navy Federal Money Market Account [BA]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Navy Mutual Aid [WU]		\$1,001 - \$15,000	None		
Northwestern Mutual 65 Life [WU]		\$15,001 - \$50,000	None		
Northwestern Mutual Whole Life [WU]		\$15,001 - \$50,000	None		
Schwab IRA ⇒ USAA TARGET RETIREMENT 2 [MF]		\$15,001 - \$50,000	None		
Schwab Roth IRA ⇒ SCHWAB VALUE ADVANTAGE M: SWVXX [MF]		\$15,001 - \$50,000	None		
SCHWAB VALUE ADVANTAGE M: SWVXX		\$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
[MF]					
Thrift Savings Plan [OT]		\$500,001 - \$1,000,000	None		
DESCRIPTION: US Federal Government's Thrift Savings Plan					
USAA Checking [BA]		\$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
Bentley Builders LLC	Salary	\$22,800.00	\$91,400.00
Defense Finance and Accounting Service	Military Pension	\$54,921.12	\$101,789.58
Department of Veterans Affairs	CONCURRENT RETIREMENT DISABILITY PAY(CRDP)	\$22,943.34	\$45,886.68

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Schwab IRA
- Schwab Roth 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: Gerry W. Leonard Jr., 07/7/2023