



Filing ID #10060816

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Mark Robertson  
**Status:** Congressional Candidate  
**State/District:** NV01

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 05/13/2024  
**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
Aggressive Growth Allocation Index Fund (FRAGX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Brighthouse [FN]	SP	\$1,001 - \$15,000	Tax-Deferred		
Brighthouse [FN]		\$1,001 - \$15,000	Tax-Deferred		
Monarch Properties [MO]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Price, UT, US					
Roth IRA ⇒ CIT Bank Account [BA]		\$100,001 - \$250,000	Tax-Deferred		
Roth IRA ⇒ LESL [DO]		\$250,001 - \$500,000	Tax-Deferred		
Roth IRA ⇒ Vanguard Money Market [IH]		\$1,000,001 - \$5,000,000	Tax-Deferred		
SEP-IRA ⇒		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BlackRock Innovation and Growth Term Trust (XBIGX) [MF]					
SEP-IRA ⇒ iShares Silver Trust (SLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		
SEP-IRA ⇒ SPDR Gold Trust (GLD) [EF]		\$15,001 - \$50,000	Tax-Deferred		
SEP-IRA ⇒ Vanguard Money Market [IH]		\$250,001 - \$500,000	Tax-Deferred		
USAA Bank Account [BA]	JT	\$50,001 - \$100,000	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
RDJ Financial Architects	Income from small business	\$8,000.00	\$18,270.00

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 INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>◦ Roth IRA</li><li>◦ SEP-IRA</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:** Mark Robertson , 05/13/2024