



Filing ID #10056635

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Leslie Mehta
Status: Congressional Candidate
State/District: VA01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 04/9/2024
Period Covered: 01/01/2023– 03/19/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CarMax 401k ⇒ T. Rowe Price Retirement 2040 Fund - I Class (TRHDX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
CarMax Inc (KMX) [ST] DESCRIPTION: 419 shares of common stock	SP	\$15,001 - \$50,000	None		
Littler Mendelson 401k ⇒ American Funds EuroPacific Growth Cl F-1 Shs (AEGFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Littler Mendelson 401k ⇒ Columbia Mid Cap Index Fund Class I (NMPAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Littler Mendelson 401k ⇒ Invesco Comstock Select Fund Class R5 (IOVXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Littler Mendelson 401k ⇒ Invesco Global Fund Class Y (OGLYX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Littler Mendelson 401k ⇒ Loomis Sayles Funds - Bond Fund Institutional Class	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(LSBDX) [MF]					
Littler Mendelson 401k ⇒ PIMCO Total Return Class R (PTRRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Littler Mendelson 401k ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Littler Mendelson 401k ⇒ The Growth Fund of America Class R-1 Shares (RGAAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Littler Mendelson 401k ⇒ Vanguard Explorer Fund Admiral Shares (VEXRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Littler Mendelson 401k ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Littler Mendelson 401k ⇒ Vanguard Tax-Managed Small Cap Fd Inst Shs (VTSIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Littler Mendelson 401k ⇒ Vanguard Total Bond Market Index Fund Institutional Select Shares (VTBSX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Baird Short Term Bond Fund Institutional Class (BSBIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ BlackRock Total Return Fund BlackRock Class (MPHQX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Cash and Money Market [IH]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Champlain Mid Cap Fund Insti Cl (CIPIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Cohen & Steers Realty Shares, Inc. Class I (CSJIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Roll-over IRA ⇒ Dodge & Cox International Stock Fund - Class I (DODFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Driehaus Emerging Markets Growth Fund Institutional Share Class (DIEMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Invesco Oppenheimer International Growth Fund Class R6 (OIGIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ JPMorgan Core Bond Fund R6 (JCBUX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ JPMorgan Large Cap Growth Fund I Class (SEEGX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ JPMorgan U.S. Research Enhanced Equity Fund - R6 Class (JDEUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ MFS Emerging Markets Debt Fund Class I (MEDIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ MFS International Equity Fund - Class I (MIEKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Northern Funds Small Cap Value Fund (NOSGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ PRIMECAP Odyssey Stock Fund (POSKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Principal Fds, Inc. SmallCap Fund, Institutional Class (PSLIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Pzena Emerging Markets Value Fund - Institutional Class		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(PZIEX) [MF]					
Schwab Roll-over IRA ⇒ T. Rowe Price Blue Chip Growth Fund - I Class (TBCIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ T. Rowe Price Emerging Markets Stock Fund - I Class (PRZIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ T. Rowe Price Equity Income Fund - I Class (REIPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roll-over IRA ⇒ Western Asset Core Bond Fund Class IS (WACSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Virginia Retirement System Defined Contribution Plans [DB]		\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo Bank Accounts [BA]	JT	\$1,001 - \$15,000	None		

* 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
Richmond Metropolitan Transportation	Salary	\$5,724.83	\$122,245.00
COMMENTS: for 2024, compensation was for PTO as Leslie's last day of work was December 31, 2023.			
CarMax	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Barclays Bank Delaware	Various	Credit card	\$15,001 - \$50,000
	Wells Fargo Bank	Various	Credit card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Council member	Rare Disease Council
COMMENTS: Service on the Rare Disease Council for Governor Glen Youngkin from 2023 - present.	
Board member and Secretary	International Rett Syndrome Foundation
COMMENTS: Board member from 2021 - present Secretary from 2023 - present	
Board member	Children's Hospital of Richmond at VCU Family Advisory Network

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2024	Leslie and Richmond Metropolitan Transportation	Leslie is on an unpaid leave of absence with the Richmond Metropolitan Transportation Authority while running for congress. The leave agreement expires on June 18, 2024, the day of the Democratic primary.

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">CarMax 401k (Owner: SP)Littler Mendelson 401k (Owner: SP)Schwab Roll-over IRA DESCRIPTION: roll-over of prior 401(k)s

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: Leslie Mehta , 04/9/2024