



Filing ID #10039492

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Kwanza Hall  
**Status:** Former Member  
**State/District:** GA05

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2021  
**Filing Date:** 02/1/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset     | Income Type(s) | Income Tx. > \$1,000?    |
|--|-------|--------------------|----------------|--------------------------|
| Hill and Hall Global, LLC, 100% Interest [OL]<br><br>LOCATION: Atlanta, GA, US<br>DESCRIPTION: Organized as Opportunity Zone business. |       | \$1,001 - \$15,000 | None           | <input type="checkbox"/> |
| Invest Atlanta 401A ⇒<br>Vantagepoint Growth [MF]  |       | \$1,001 - \$15,000 | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 401A ⇒<br>VP Milestone 2040 [MF]  |       | \$1,001 - \$15,000 | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 401A ⇒<br>VT AMG TimesSquare Mid Cap Gr [MF]  |       | \$1,001 - \$15,000 | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 401A ⇒<br>VT Carillon Eagle Mid Cap Gr [MF]   |       | \$1,001 - \$15,000 | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 401A ⇒<br>VT Contrafund [MF]  |       | \$1,001 - \$15,000 | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 401A ⇒<br>VT Invesco Oppenheimer Disc [MF]  |       | \$1,001 - \$15,000 | Tax-Deferred   | <input type="checkbox"/> |

| Asset   | Owner | Value of Asset      | Income Type(s) | Income Tx. > \$1,000?    |
|---|-------|---------------------|----------------|--------------------------|
| Invest Atlanta 401A ⇒<br>VT T Rowe Price® Growth Stock [MF]   |       | \$1,001 - \$15,000  | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>Vantagepoint Emerging Mrkts [MF]   |       | \$1 - \$1,000       | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>Vantagepoint Growth Fund [MF]  |       | \$1 - \$1,000       | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>VP Milestone 2035 [MF]   |       | \$1,001 - \$15,000  | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>VP Milestone 2040 [MF]   |       | \$1 - \$1,000       | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>VP Milestone 2045 [MF]   |       | \$1 - \$1,000       | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>VP Milestone 2055 [MF]   |       | \$1 - \$1,000       | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>VT AMG TimesSquare Mid Cap Gr [MF]   |       | \$1 - \$1,000       | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>VT Carillon Eagle Mid Cap Gr [MF]  |       | \$1 - \$1,000       | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>VT Contrafund® [MF]  |       | \$1,001 - \$15,000  | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>VT Invesco Oppenheimer Disc [MF]   |       | \$1,001 - \$15,000  | Tax-Deferred   | <input type="checkbox"/> |
| Invest Atlanta 457b ⇒<br>VT T Rowe Price® Growth Stock Fund [MF]  |       | \$15,001 - \$50,000 | Tax-Deferred   | <input type="checkbox"/> |
| Leon Hall Opportunity Zone Fund, 100% Interest [OL]<br><br>LOCATION: Atlanta, GA, US<br>DESCRIPTION: Organized but have not activated via a capital gain. |       | \$1 - \$1,000       | None           | <input type="checkbox"/> |
| Mass Mutual (Fulton) 457 ⇒<br>Amerifunds Europacific Gr Fund [MF]   |       | \$1 - \$1,000       | Tax-Deferred   | <input type="checkbox"/> |
| Mass Mutual (Fulton) 457 ⇒  |       | \$1 - \$1,000       | Tax-Deferred   | <input type="checkbox"/> |

| Asset  | Owner | Value of Asset       | Income Type(s) | Income Tx. > \$1,000?    |
|--|-------|----------------------|----------------|--------------------------|
| BlackRock Total Return Fund [MF]   |       |                      |                |                          |
| Mass Mutual (Fulton) 457 ⇒<br>Invesco Small Cap Value Fund [MF]  |       | \$1 - \$1,000        | Tax-Deferred   | <input type="checkbox"/> |
| Mass Mutual (Fulton) 457 ⇒<br>Janus Henderson Venture Fd [MF]  |       | \$1 - \$1,000        | Tax-Deferred   | <input type="checkbox"/> |
| Mass Mutual (Fulton) 457 ⇒<br>MFS Value Fund [MF]  |       | \$1 - \$1,000        | Tax-Deferred   | <input type="checkbox"/> |
| Mass Mutual (Fulton) 457 ⇒<br>Prm Hgh Yld Fd (Barings) [MF]  |       | \$1 - \$1,000        | Tax-Deferred   | <input type="checkbox"/> |
| Mass Mutual (Fulton) 457 ⇒<br>Select Eq Opps Fd (Wllngtn/TRP) [MF]   |       | \$1 - \$1,000        | Tax-Deferred   | <input type="checkbox"/> |
| Mass Mutual (Fulton) 457 ⇒<br>Vanguard 500 Index Fund [MF]   |       | \$1,001 - \$15,000   | Tax-Deferred   | <input type="checkbox"/> |
| Mass Mutual (Fulton) 457 ⇒<br>Vanguard Small Cap Index Fund [MF]   |       | \$1 - \$1,000        | Tax-Deferred   | <input type="checkbox"/> |
| Old Fourth Ward Opportunity Zone Fund, 100% Interest [OL]<br><br>LOCATION: Atlanta/Fulton, GA, US<br>DESCRIPTION: Organized but have not activated via a capital gain. |       | \$1 - \$1,000        | None           | <input type="checkbox"/> |
| Prudential Defined Contribution (City of Atl) ⇒<br>American Funds EuroPacific Growth Fund Class R-6 [MF]   |       | \$1 - \$1,000        | Tax-Deferred   | <input type="checkbox"/> |
| Prudential Defined Contribution (City of Atl) ⇒<br>Brown Capital Management Small Company Fund Institutional Shares [MF]   |       | \$1,001 - \$15,000   | Tax-Deferred   | <input type="checkbox"/> |
| Prudential Defined Contribution (City of Atl) ⇒<br>Franklin Small Cap Value Fund Class R6 [MF]   |       | \$1,001 - \$15,000   | Tax-Deferred   | <input type="checkbox"/> |
| Prudential Defined Contribution (City of Atl) ⇒<br>Large Cap Growth I Fund (managed by T. Rowe Price) [MF]   |       | \$50,001 - \$100,000 | Tax-Deferred   | <input type="checkbox"/> |
| Prudential Defined Contribution (City of Atl) ⇒<br>Mid Cap Growth I Fund (managed by Ivy) [MF]   |       | \$1,001 - \$15,000   | Tax-Deferred   | <input type="checkbox"/> |
| Prudential Defined Contribution (City of Atl) ⇒  |       | \$1,001 - \$15,000   | Tax-Deferred   | <input type="checkbox"/> |

| Asset   | Owner | Value of Asset     | Income Type(s) | Income Tx. > \$1,000?    |
|---|-------|--------------------|----------------|--------------------------|
| Prudential Day One 2035 Fund [MF]   |       |                    |                |                          |
| Prudential Defined Contribution (City of Atl) ⇒ Prudential Day One 2045 Fund [MF] |       | \$1,001 - \$15,000 | Tax-Deferred   | <input type="checkbox"/> |
| Prudential Defined Contribution (City of Atl) ⇒ Prudential Stable Value Fund [MF] |       | \$1 - \$1,000      | Tax-Deferred   | <input type="checkbox"/> |

\* 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 B: TRANSACTIONS

None disclosed.

### SCHEDULE C: EARNED INCOME

| Source       | Type | Amount     |
|--------------|------|------------|
| Kemal Karsli | Fee  | \$6,300.00 |

### SCHEDULE D: LIABILITIES

| Owner | Creditor                | Date Incurred | Type        | Amount of Liability        |
|-------|-------------------------|---------------|-------------|----------------------------|
|       | Credit Union of Atlanta | 2018          | Credit Card | \$5,000,001 - \$25,000,000 |

### SCHEDULE E: POSITIONS

| Position           | Name of Organization                  |
|--------------------|---------------------------------------|
| City Councilmember | City of Atlanta                       |
| Managing Director  | Invest Atlanta                        |
| Partner            | Kovach Hall Development               |
| Founder            | Hill and Hall Global, LLC             |
| Organizer          | Leon Hall Opportunity Zone Fund       |
| Organizer          | Old Fourth Ward Opportunity Zone Fund |
| Board Member       | World Affairs Council                 |
| Board Member       | Leadership Atlanta                    |

| Position                         | Name of Organization |
|----------------------------------|----------------------|
| Director of Government Relations | TheraTrue, Inc.      |

## SCHEDULE F: AGREEMENTS

| Date         | Parties To      | Terms of Agreement   |
|--------------|-----------------|--|
| January 2019 | Invest Atlanta  | Separation Agreement and General Release. This agreement memorialized the end of health benefits and a severance payment of \$24,538.40 by Feb. 28th 2019 conditioned on the completion of a final report and transition plan. The agreement also included full and final release, non-disparagement, and confidentiality clauses.   |
| August 2020  | TheraTrue, Inc. | Voluntary Separation Agreement. I voluntarily terminated my consulting role as Director of Government Relations and released the company from all present and future claims. There was also an agreement that I would not: 1)disclose confidential information, 2)become an employee at a competitive firm in medical cannabis in Georgia for 1 year nor 3)solicit TheraTrue customers for 18 months from August 11, 2020. |

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Invest Atlanta 401A
- Invest Atlanta 457b
- Mass Mutual (Fulton) 457
- Prudential Defined Contribution (City of Atl)

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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:** Hon. Kwanza Hall , 02/1/2021