



Filing ID #10017799

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Scott Perry
Status: Member
State/District: PA04

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2016
Filing Date: 06/27/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Funds ⇒ Capital Income Builder-A	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ Capital World Growth & Income Fund-A	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ Smallcap World Fund-A	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ The Bond Fund of America-A	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity FDM Idx 2035 IPR	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Hydrotech Mechanical Services, 49% Interest	None		Interest, S Corporation Income	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Dillsburg/Cumberland, PA, US DESCRIPTION: Owned 49% interest in S Corporation. The corporation was sold in 2016. COMMENTS: Reporting S Corporation share of earnings but no money was actually received in distribution from the company.					
LPL Financial ⇒		\$50,001 -	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Balanced Cl A		\$100,000			
LPL Financial ⇒ Insured Cash Account		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Members First Credit Union		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Pennsylvania 529 Guaranteed Savings Plan - Mattea		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: PA					
Pennsylvania 529 Guaranteed Savings Plan - Ryenn		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: PA					
Pennsylvania State Employees Credit Union	SP	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
Residential Rental - Dillsburg, PA		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Dillsburg/Cumberland, PA, US					
Residential Rental - Harrisburg, PA		\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Harrisburg/Dauphin, PA, US					
State Farm Bank CDs	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard ⇒ 500 Index Fund Adm	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ LifeStrategy Mod Growth	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ Total Stock Mkt Idx Inv	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ US Growth Fund Investor	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Golden Living/Aegis Therapies	spouse salary	N/A
Pennsylvania State Employees' Retirement System	state retirement	\$14,397.84
Doterra International LLC	spouse business income	\$2,320.16

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Seterus Inc	November 2003	Mortgage on Residential Rental - Harrisburg, PA	\$50,001 - \$100,000
	Suntrust Mortgage	January 2001	Mortgage on Residential Rental - Dillsburg, PA	\$50,001 - \$100,000
	Members First Federal Credit Union	September 2010	Mortgage on Personal Residence	\$250,001 - \$500,000
	Members First Federal Credit Union	June 2012	Personal Line of Credit	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Secretary/Treasurer	Hydrotech Mechanical Services, Inc

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2013	Scott Perry and Pennsylvania State Employee Retirement System	Continued participation in the Pennsylvania State Employee Retirement System.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Heritage Foundation	12/2/2016	12/3/2016	Washington DC - Charlottesville VA - DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- o American Funds (Owner: SP)
- o LPL Financial
- o Vanguard (Owner: SP)

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. Scott Perry , 06/27/2017