



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Kerry Donovan
Status: Congressional Candidate
State/District: CO03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 07/14/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Inc. (AAPL) [ST]	SP	\$1,001 - \$15,000	None		
Brokerage Account ⇒ Bank Sweep Account [BA]		\$1,001 - \$15,000	Interest	None	None
Brokerage Account ⇒ ETFMG Alternative Harvest ETF (MJ) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage Account ⇒ First Trust Cloud Computing ETF (SKYY) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage Account ⇒ Global X Autonomous & Electric Vehicles ETF (DRIV) [EF]		\$1,001 - \$15,000	None		
Brokerage Account ⇒ Invesco Developing Markets Fund Class A (ODMAX) [MF]		\$1,001 - \$15,000	None		
Brokerage Account ⇒ iShares Inc iShares MSCI Sweden ETF (EWD) [EF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brokerage Account ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Brokerage Account ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage Account ⇒ iShares S&P Global Clean Energy Index Fund (ICLN) [EF]		\$1,001 - \$15,000	None		
Brokerage Account ⇒ SPDR Series Trust SPDR S&P Biotech ETF (XBI) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage Account ⇒ T. Rowe Price Africa & Middle East Fund (TRAMX) [MF]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Brokerage Account ⇒ Vanguard Growth ETF (VUG) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Brokerage Account ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage Account ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Citywide Bank Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Donovan's Copper Bar Ranch LLLP [FA] LOCATION: Edwards, CO, US DESCRIPTION: Cattle Ranch	JT	\$1,000,001 - \$5,000,000	Farm Income	None	\$5,001 - \$15,000
First Bank Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
First Bank Account [BA]		\$250,001 - \$500,000	Interest	\$1 - \$200	\$1 - \$200
Gehant Bank Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
PERA Defined Benefit Pension Plan [DB]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Residential Rental Property [RP] LOCATION: Vail, CO, US		\$250,001 - \$500,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
Residential Rental Property [RP] LOCATION: Denver, CO, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	None
Rollover IRA ⇒ First Trust Cloud Computing ETF (SKYY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ Guinness Atkinson Alternative Energy Fund (GAAEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ Invesco DWA Emerging Markets Momentum ETF (PIE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ iShares MSCI China ETF (MCHI) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ iShares Silver Trust (SLV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ iShares U.S. Financial ETF (IYF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ iShares U.S. Healthcare ETF (IYH) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ SPDR Gold Trust (GLD) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ SPDR S&P Dividend ETF (SDY) [EF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rollover IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ Vanguard Growth ETF (VUG) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ WisdomTree International LargeCap Dividend Fund (DOL) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Town of Vail 401a Account ⇒ Vantagepoint Model Portfolio Global Equity Growth Fund R1 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Account [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Wolcott Storage, LLC [OL]		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Wolcott, CO, US DESCRIPTION: Storage Company					

* 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
State of Colorado	Salary	\$11,250.00	\$30,000.00
Hickenlooper for Colorado	Spouse Salary	N/A	N/A
U.S. Senate	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
State Senator	Colorado State Senate
Board Member	Eagle River Scholarship Fund

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- o Brokerage Account
LOCATION: US
- o Rollover IRA
- o Town of Vail 401a Account

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: Kerry Donovan , 07/14/2021