



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Cora Neumann  
**Status:** Congressional Candidate  
**State/District:** MToo

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 11/10/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401k ⇒ VEMAX [EF] DESCRIPTION: SEP-IRA		\$1,001 - \$15,000	Tax-Deferred		
401k ⇒ VEXPX [EF] DESCRIPTION: SEP-iRA		\$1,001 - \$15,000	Tax-Deferred		
401k ⇒ VFIAX [EF] DESCRIPTION: SEP-IRA		\$1,001 - \$15,000	Tax-Deferred		
401k ⇒ VFORX [EF] DESCRIPTION: SEP-IRA		\$15,001 - \$50,000	Tax-Deferred		
401k ⇒ VINEX [EF] DESCRIPTION: SEP-IRA		\$1,001 - \$15,000	Tax-Deferred		
401k ⇒ VMVFX [EF]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
DESCRIPTION: SEP-IRA					
Allbodies Inc [OP]		None	None		
DESCRIPTION: Unascertainable Value					
DC College Savings Plan ⇒ DC (Dependent Child) College Savings 2025 Portfolio [5P]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
LOCATION: DC					
DC College Savings Plan ⇒ US Total Stock Market Index Portfolio [5P]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
LOCATION: DC					
Landit Inc [PS]		\$1 - \$1,000	None		
DESCRIPTION: Stock in privately held company					
LendingClub Banking [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	None
Microlending [OT]	SP	\$1,001 - \$15,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Lending Platform					
my529 ⇒ 60/40 Balanced [5P]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
LOCATION: UT					
my529 ⇒ Target Enrollment 2028/2029 [5P]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	None	None
LOCATION: UT					
Reset Leadership LLC, 100% Interest [OL]		\$15,001 - \$50,000	Dividends	None	\$15,001 - \$50,000
LOCATION: Bozeman, MT, US					
DESCRIPTION: Consulting LLC without significant assets owned by self					
TIAA Defined Benefit Pension Plan [PE]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: While plan is named "defined benefit" it's actually defined contribution.					

\* 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
IRS	Spouse Salary	N/A	N/A
University of Montana	Public Health Training	N/A	\$500.00

#### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Mohela (Student Loan)	2004	Student Loan	\$50,001 - \$100,000
SP	Navient (Student Loan)	2019	Student Loan	\$50,001 - \$100,000

#### SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Advisors	Haven Nonprofit Bozeman MT
Board of Advisors	Columbia University Mailman School of Public Health
Public Health Advisor	Global First Ladies Alliance

#### SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
First Ladies Initiative/Global First Ladies Alliance (Los Angeles, CA, US)	Public Health Advisor
Western Native Voice (Billings, MT, US)	Public Health Advisor
Covid Local (Washington, DC, US)	Public Health Advisor
Montana Public Health Institute (Kalispell, MT, US)	Public Health Advisor
Creative Visions (Malibu, CA, US)	Program Facilitator

#### SCHEDULE A ASSET CLASS DETAILS

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- 401k  
DESCRIPTION: Vanguard
- DC College Savings Plan (Owner: DC)  
LOCATION: DC  
DESCRIPTION: College Savings Plan
- my529 (Owner: DC)  
LOCATION: UT  
DESCRIPTION: College Savings Plan

## 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

## COMMENTS

## 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:** Cora Neumann , 11/10/2021