Filing ID #10060816

Financial Disclosure Report

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

Filer Information

Name: Mark Robertson
Status: Congressional Candidate
State/District: NV01

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/13/2024
Period Covered: 01/01/2023– 04/15/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Aggressive Growth Allocation Index Fund (FRAGX) [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
Brighthouse [FN]	SP	$1,001 - $15,000	Tax-Deferred		
Brighthouse [FN]		$1,001 - $15,000	Tax-Deferred		
Monarch Properties [MO] Location: Price, UT, US	SP	$15,001 - $50,000	Dividends	$1,001 - $2,500	$1,001 - $2,500
Roth IRA ⇒ CIT Bank Account [BA]		$100,001 - $250,000	Tax-Deferred		
Roth IRA ⇒ LESL [DO]		$250,001 - $500,000	Tax-Deferred		
Roth IRA ⇒ Vanguard Money Market [IH]		$1,000,001 - $5,000,000	Tax-Deferred		
SEP-IRA ⇒		$1 - $1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BlackRock Innovation and Growth Term Trust (XBIGX) [MF]					
SEP-IRA ⇒ iShares Silver Trust (SLV) [EF]		$15,001 - $50,000	Tax-Deferred		
SEP-IRA ⇒ SPDR Gold Trust (GLD) [EF]		$15,001 - $50,000	Tax-Deferred		
SEP-IRA ⇒ Vanguard Money Market [IH]		$250,001 - $500,000	Tax-Deferred		
USAA Bank Account [BA]	JT	$50,001 - $100,000	Interest	$1 - $200	$1 - $200

* 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
RDJ Financial Architects	Income from small business	$8,000.00	$18,270.00

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Investment Vehicle Details

- Roth IRA
- SEP-IRA

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: Mark Robertson , 05/13/2024