



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Mr. Goutam Umesh Jois  
**Status:** Congressional Candidate  
**State/District:** NJ07

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 01/2/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
E. Jois UBS Roth IRA ⇒ SPDR S&P 500 ETF TR	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois UBS Roth IRA ⇒ UBS BANK USA DEP ACCT	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois UBS Roth IRA ⇒ VANGUARD TOTAL STOCK MKT ETF	SP	\$15,001 - \$50,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ AmericanFunds EuroPacific R6	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ AmericanFunds Growth Fnd R6	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ AmericanFunds Nw Prspctv R6	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ Eaton Vance-AtlantaCap SMID-Cp F R6	SP	\$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>
E. Jois Voya Retirement Acct ⇒ JPMorganEquity IncomeFund R6	SP	\$1,001 - \$15,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ VanguardLifeStrat Growth Fd Inv	SP	\$15,001 - \$50,000	Tax-Deferred		
E. Jois Voya Retirement Acct ⇒ VanguardMid-Cap IndexFund Adm	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Rollover IRA		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Roth IRA		\$15,001 - \$50,000	Tax-Deferred		
G. Jois UBS Roth IRA ⇒ ISHARES CORE S&P 500 ETF		\$15,001 - \$50,000	Tax-Deferred		
G. Jois UBS Roth IRA ⇒ SPDR S&P 500 ETF TR		\$1,001 - \$15,000	Tax-Deferred		
G. Jois UBS Roth IRA ⇒ UBS BANK USA DEP ACCT		\$15,001 - \$50,000	Tax-Deferred		
G. Jois UBS Roth IRA ⇒ VANGUARD TOTAL STOCK MKT ETF		\$50,001 - \$100,000	Tax-Deferred		
G. Jois Voya 401k ⇒ EuroPacific Growth Class R-6		\$15,001 - \$50,000	Tax-Deferred		
G. Jois Voya 401k ⇒ T Rowe Price Balanced		\$1,001 - \$15,000	Tax-Deferred		
G. Jois Voya 401k ⇒ Vanguard S&P Mid Cap 400 Fund		\$15,001 - \$50,000	Tax-Deferred		
G. Jois Voya 401k ⇒ Vanguard Small Cap ValueIndex		\$1,001 - \$15,000	Tax-Deferred		
G. Jois Voya 401k ⇒ Vanguard TotalBond Market		\$1,001 - \$15,000	Tax-Deferred		
G. Jois Voya 401k ⇒ VanguardS&P 500 Inst Ind Fund		\$15,001 - \$50,000	Tax-Deferred		
J.P. Morgan Chase Checking		\$50,001 -	Interest	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
		\$100,000			
Real Property in New York, NY		\$500,001 - \$1,000,000	Rent	None	\$2,501 - \$5,000
LOCATION: New York, NY, US					
UBS RMA Account		\$1,001 - \$15,000	Interest	None	\$1 - \$200

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

### SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
JCMS Inc	Legal services		\$40,000.00
Gibson, Dunn & Crutcher LLP	Salary		\$285,004.66
New York Legal Assistance Group Inc	Spouse Salary		\$70,900.48

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	J.P. Morgan Chase Bank	January 2011	Mortgage	\$250,001 - \$500,000
	U.S. Department of Education	August 2004	Student Loans	\$50,001 - \$100,000
SP	Citibank	August 2004	Student loan	\$50,001 - \$100,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Young Trustee	Atlas Service Corps Inc
Director	JCMS Inc

### 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 E. Jois UBS Roth IRA (Owner: SP)
- o E. Jois Voya Retirement Acct (Owner: SP)
- o G. Jois UBS Roth IRA
- o G. Jois Voya 401k

## 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:** Mr. Goutam Umesh Jois , 01/2/2018