



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: LuAnn Bennett
Status: Congressional Candidate
State/District: VA10

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2016
Filing Date: 05/13/2016
Period Covered: 01/01/2015– 04/15/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ashleigh Farm LLC ⇒ Property in Delaplane, Virginia LOCATION: Delaplane, VA, US COMMENTS: Asset owned 50/50 with Bennett Marital Trust		\$1,000,001 - \$5,000,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
BB&T Bank Accounts ⇒ BB&T Bank Accounts (cash)		\$1,001 - \$15,000	Interest	None	\$1 - \$200
Bennett Family LLC ⇒ UBS Business Account ⇒ Alphakeys Real Estate Opportunities Fund III		\$1,001 - \$15,000	Distribution	None	\$2,501 - \$5,000
Bennett Group ⇒ Bennett Group LOCATION: Washington, DC, US DESCRIPTION: General contracting and construction management services		\$1,000,001 - \$5,000,000	S Corp. Income	None	\$50,001 - \$100,000
Bennett Group Inc. 401(k) ⇒ Federated Prime Cash Obligations Fund (PCOXX)		\$1,001 - \$15,000	Tax-Deferred		
Bennett Marital Trust ⇒		\$1,001 - \$15,000	Royalties	None	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Sunoco Partners Marketing & Terminals L.P. DESCRIPTION: Oil Producer in Sugar Land, TX					\$1,000
Bennett Marital Trust ⇒ Vitol Inc. Crude Oil Marketing Division DESCRIPTION: Oil Producer in Houston, TX		\$1,001 - \$15,000	Royalties	None	\$201 - \$1,000
Bennett Marital Trust ⇒ Ashleigh Farm LLC ⇒ Property in Delaplane, Virginia LOCATION: Delaplane, VA, US COMMENTS: Asset owned 50/50 with Filer personally		\$1,000,001 - \$5,000,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
Bennett Marital Trust ⇒ Bennett Family LLC ⇒ Bessemer - Bennett Family LLC Account ⇒ Old Westbury Private Equity Fund 2001, LLC - Series A		\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	None
Bennett Marital Trust ⇒ Bennett Family LLC ⇒ UBS Business Account ⇒ Alphakeys Distressed Opportunities Fund II		\$1,001 - \$15,000	Distributions	None	\$2,501 - \$5,000
Bennett Marital Trust ⇒ Bennett Family LLC ⇒ UBS Business Account ⇒ Alphakeys Real Estate Opportunities Fund III		\$50,001 - \$100,000	Distributions	None	\$50,001 - \$100,000
Bennett Marital Trust ⇒ Bennett Family LLC ⇒ UBS Business Account ⇒ UBS Business Account (cash)		\$1,001 - \$15,000	Interest	None	None
Bennett Marital Trust ⇒ UBS Marital Trust Checking Account ⇒ UBS Bank Deposit Account		\$1,001 - \$15,000	Interest	None	\$1 - \$200
Bennett Marital Trust ⇒ UBS Marital Trust Securities ⇒ AMG Yacktman Service Fund (YACKX)		\$100,001 - \$250,000	Capital Gains, Dividends	None	\$15,001 - \$50,000
Bennett Marital Trust ⇒ UBS Marital Trust Securities ⇒ DoubleLine Total Return Bond Fund (DBLTX)		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Bennett Marital Trust ⇒ UBS Marital Trust Securities ⇒ First Eagle Global Fund Class 1 (SGIIX)		\$100,001 - \$250,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Bennett Marital Trust ⇒ UBS Marital Trust Securities		\$100,001 -	Capital Gains,	None	\$5,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
⇒ FPA Crescent Fund (FPACX)		\$250,000	Dividends		\$15,000
Bennett Marital Trust ⇒ UBS Marital Trust Securities ⇒ Lord Abbett Intermediate Tax-Free Fund Class F (LISFX)		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Bennett Marital Trust ⇒ UBS Marital Trust Securities ⇒ Templeton Global Bond Advanced Fund (TGBAX)		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Bennett Marital Trust ⇒ UBS Money Market Fund ⇒ RMA Tax-Free Fund Inc.		\$1,001 - \$15,000	None		
Bessemer - Personal Account ⇒ Old Westbury Global Private Equity Fund, LLC		\$15,001 - \$50,000	None		
NJ-H Phase II LLC ⇒ New Jersey & H Phase II LP ⇒ New Jersey & H Street Phase II LLC ⇒ 801 NJ Phase II LLC LOCATION: Washington, DC, US DESCRIPTION: Real Estate Development		\$100,001 - \$250,000	None		
Rental Property in Washington, DC LOCATION: Washington, DC, US		\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	None
UBS Personal Money Market ⇒ RMA Tax-Free Fund Inc.		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
UBS Personal Securities ⇒ DoubleLine Total Return Bond Fund (DBLTX)		None	Dividends	None	\$1,001 - \$2,500
UBS Personal Securities ⇒ Templeton Global Bond Advanced Fund (TGBAX)		None	Dividends	None	\$201 - \$1,000

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Bennett Group, Inc.	Salary	\$29,166.69	\$135,917.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	UBS	May 2014	Line of credit	\$250,001 - \$500,000
COMMENTS: Held by Bennett Marital Trust.				
	BB&T	October 2010	Mortgage for Property in Delaplane, VA	\$1,000,001 - \$5,000,000
COMMENTS: Liability was refinanced in February 2015. Current amount owed is \$0.				
	BB&T	February 2015	Mortgage for Property in Delaplane, VA	\$1,000,001 - \$5,000,000
	BB&T	September 2015	Mortgage for Rental Property in Washington, D.C.	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Member	NJ-H Phase II LLC
Managing Member	Bennett Family LLC
Member of Board of Directors	Institute for Sustainable Communities
Officer	National Children's Museum
Member of Board of Advisors	New Jersey & H Educational Fund
COMMENTS: The position and organization name has been revised for purposes of this report to provide a technical clarification of the filer's position during the reporting period covered by both candidate reports.	
Managing Member	Ashleigh Farm LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2012	LuAnn Bennett and New Jersey & H Phase II LP	In exchange for past services, New Jersey & H Phase II LP agrees to pay filer an amount equal to 5% of sales price received by LP, if property owned in part by LP is sold.

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

Source (Name and Address)	Brief Description of Duties
New Jersey & H Phase II LP (Washington, DC, US)	Real Estate Property Management Services

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">o Ashleigh Farm LLC LOCATION: USo BB&T Bank Accounts LOCATION: USo Bennett Family LLC LOCATION: USo Bennett Family LLC ⇒ UBS Business Account LOCATION: USo Bennett Group LOCATION: USo Bennett Group Inc. 401(k)o Bennett Marital Trusto Bennett Marital Trust ⇒ Ashleigh Farm LLC LOCATION: USo Bennett Marital Trust ⇒ Bennett Family LLCo Bennett Marital Trust ⇒ Bennett Family LLC ⇒ Bessemer - Bennett Family LLC Account LOCATION: USo Bennett Marital Trust ⇒ Bennett Family LLC ⇒ UBS Business Account LOCATION: USo Bennett Marital Trust ⇒ UBS Marital Trust Checking Account LOCATION: USo Bennett Marital Trust ⇒ UBS Marital Trust Securities LOCATION: USo Bennett Marital Trust ⇒ UBS Money Market Fund LOCATION: USo Bessemer - Personal Account LOCATION: USo NJ-H Phase II LLC LOCATION: USo NJ-H Phase II LLC ⇒ New Jersey & H Phase II LP LOCATION: USo NJ-H Phase II LLC ⇒ New Jersey & H Phase II LP ⇒ New Jersey & H Street Phase II LLC LOCATION: USo UBS Personal Money Market LOCATION: USo UBS Personal Securities
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LOCATION: US

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: LuAnn Bennett , 05/13/2016