



Filing ID #10035931

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Ms. Lynn Afendoulis  
**Status:** Congressional Candidate  
**State/District:** MI03

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2020  
**Filing Date:** 05/15/2020  
**Period Covered:** 01/01/2019– 04/15/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Legacy IRA ⇒ AB Small Cap Value Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
Legacy IRA ⇒ Alger Weatherbie Specialized Growth Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Legacy IRA ⇒ AMG GW&K Trilogy Emerging Markets Equity Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Legacy IRA ⇒ Harbor Capital Appreciation Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
Legacy IRA ⇒ Hartford Midcap Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Legacy IRA ⇒ JP Morgan Core Bond Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Legacy IRA ⇒ Oakmark Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Legacy IRA ⇒ Transamerican Midcap Value Opportunities [MF]		\$1,001 - \$15,000	Tax-Deferred		
Legacy IRA ⇒ Vanguard Short term Investment grade fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Legacy IRA ⇒ WCM Focused International Growth Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Legacy IRA ⇒ Western Asset Income Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Legacy Trust Stock [PS]  DESCRIPTION: Board Compensation.		\$15,001 - \$50,000	Dividends	None	None
RJ IRA ⇒ AB Large Cap Growth FD Advisor Class [MF] [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Blackrock Health Sciences Opportunities Port Inst. CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Cohen & Steers Real Estate Securities Fund Class I [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Eaton Vance Atlanta Capital SMID Cap Fund Class I [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Fidelity Advisor Materials [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Invesco Oppenheimer Development Markets Fund Class Y N/L [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ JP Morgan Small Cap Equity Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Oakmark Fund Investor Class N/L [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RJ IRA ⇒ Oakmark International Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Victory Sycamore Established Value Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ YMG Yacktman Fund Class I N/L [MF]		\$1,001 - \$15,000	Tax-Deferred		
UFP Industries, Inc. (UFPI) [ST]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
UFP Industries, Inc. (UFPI) [ST]		\$500,001 - \$1,000,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000

\* 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
UFP Industries	Contract service	\$12,040.00	\$125,440.63
State of Michigan	Salary	\$19,351.10	\$66,265.25

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	CapitalOne	2019-2020	credit card	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Economic Club of Grand Rapids

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Legacy IRA  
DESCRIPTION: Former UFP 401k, moved to Legacy Trust
- RJ 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:** Ms. Lynn Afendoulis , 05/15/2020