



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Mariannette Jane Miller-Meeks
Status: Congressional Candidate
State/District: IA02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 10/23/2021
Period Covered: 01/01/2019– 05/15/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baird Core Plus Bond Inst [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
DFA Emerging Markets Core Equity Portfolio Inst Class [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
DFA Five Year Global Fixed Income [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
DFA Global Real Estate Secs [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
DFA International Small Cap Value Portfolio Inst Class [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
DFA Intl High Relative Profitability Port Inst Class [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
DFA Intl Small Company Port Inst Class [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
DFA Intl Value III [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DFA Two Year Global Fixed Income [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
DFA US High Relative Profitability Insti [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
DFA US Large Cap Value III ⇒ DFA US Large Cap Value III [MF]	JT	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Rollover IRA managed by Foster Group					
DFA US Micro Cap [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
DFA US Small Cap Value [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
SPDR Barclays Short Term Treasury ETF [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Stone Ridge Reinsurance risk Premium [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
TD Ameritrade Money Market Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
TIAA-CREF ⇒ CREF Bond Market R3 [MF]		\$1,001 - \$15,000	Tax-Deferred		
TIAA-CREF ⇒ CREF Equity Index R3 [MF]		\$50,001 - \$100,000	Tax-Deferred		
TIAA-CREF ⇒ CREF Global Equities R3 [MF]		\$100,001 - \$250,000	Tax-Deferred		
TIAA-CREF ⇒ CREF Growth R3 [MF]		\$100,001 - \$250,000	Tax-Deferred		
TIAA-CREF ⇒ CREF Money Market [MF]		\$1,001 - \$15,000	Tax-Deferred		
TIAA-CREF ⇒ CREF Stock R3 [MF]		\$100,001 - \$250,000	Tax-Deferred		
TIAA-CREF ⇒ TIAA Traditional [MF]		\$15,001 - \$50,000	Tax-Deferred		
TIAA-CREF ⇒ TIAA-CREF Money Market Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard FTSE Developed Markets [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Vanguard Health Care Fund ⇒ GNMA Fund Investor Shares ⇒ Vanguard GNMA Fund Investor Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Health Care Fund ⇒ High-Yield Corp Fund Investor ⇒ High-Yield Corp Fund Investor [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Health Care Fund ⇒ Inflation-Protect Sec Inv ⇒ Inflation-Protect Sec Inv [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Health Care Fund ⇒ Short-Term Treasury Inv ⇒ Short-Term Treasury Inv [MF]		\$1 - \$1,000	Tax-Deferred		
Vanguard Health Care Fund ⇒ Traditional Non-Deductible IRA ⇒ Vanguard Equity Income Fund I [MF] DESCRIPTION: Non-deductible IRA Spouse		\$100,001 - \$250,000	Tax-Deferred		
Vanguard Health Care fund [MF] DESCRIPTION: Non deductible traditional IRA		\$15,001 - \$50,000	Tax-Deferred		
Vanguard Inter-Term Invt Grade Admiral [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Vanguard Roth IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Roth IRA [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard Short-Term Treasury Admiral [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Vanguard Small Cap Value Index Admiral [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Vanguard Total Bond Market Index Admiral [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Vanguard Total Stock Market [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Vanguard Value Index Admiral ⇒ Vanguard Value Index Admiral [MF] DESCRIPTION: Rollover IRA managed by Foster Group	JT	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Voya Financial ⇒ Dodge & Cox International Stock Fund [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		
Voya Financial ⇒ Vanguard Dividend Growth Fund Inv [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		
Voya Financial ⇒ Vanguard Mid-Cap Index Fund Inst [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		
Voya Financial ⇒ Vanguard Small-Cap Index Fund Inst [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		
Voya Financial ⇒ Vanguard Total Bond Market Ind F Adm [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		
Voya Financial ⇒ Voya Fixed Account [OT] DESCRIPTION: Deferred salary from GRHS		\$1,001 - \$15,000	Tax-Deferred		
Voya Financial ⇒ Voya Fixed Plus Account III [MF] DESCRIPTION: 401K through Great River Health Systems		\$1,001 - \$15,000	Tax-Deferred		
Voya Financial ⇒ Voya Fixed Plus Account III A [OT] DESCRIPTION: Deferred salary from GRHS		\$100,001 - \$250,000	Tax-Deferred		
Voya Financial ⇒ Voya Fixed Plus Account III A [MF] DESCRIPTION: 401K through GRHS		\$15,001 - \$50,000	Tax-Deferred		
Voya Financial ⇒ Voya Global Bond Port [MF] DESCRIPTION: 401K through Great River Health Systems		\$1,001 - \$15,000	Tax-Deferred		
Voya Financial ⇒ Voya Large Cap Growth Port [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Voya Financial ⇒ VY Baron Growth Portofolio [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: 401K through employer at Great River Health Systems					
Voya Financial ⇒ VY Inv OppGlobal Port [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 401K through Great River Health Systems					
Voya Financial ⇒ VY T Rowe Price Growth Equity [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Income Deferred Account through employment with Great River Health Systems					

* 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
State of Iowa	salary	\$31,281.00	\$26,482.00
Great River Health Systems	Physician salary	\$53,848.00	\$209,774.00
Iowa Public Employees Retirement System	state pension	\$2,072.00	\$4,972.00
Wapello County Board of Veterans Affairs	Board Commissioner	\$50.00	\$225.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Commissioner	Wapello County Board of Veterans Affairs

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- DFA US Large Cap Value III (Owner: JT)
DESCRIPTION: Managed by Foster Group
- TIAA-CREF
DESCRIPTION: Retirement Account
- Vanguard Health Care Fund
DESCRIPTION: Non-deductible traditional IRA
- Vanguard Health Care Fund ⇒ GNMA Fund Investor Shares
- Vanguard Health Care Fund ⇒ High-Yield Corp Fund Investor
- Vanguard Health Care Fund ⇒ Inflation-Protect Sec Inv
- Vanguard Health Care Fund ⇒ Short-Term Treasury Inv
- Vanguard Health Care Fund ⇒ Traditional Non-Deductible IRA
DESCRIPTION: IRA in Health Care Fund at Vanguard
- Vanguard Value Index Admiral (Owner: JT)
DESCRIPTION: Managed by Foster Group
- Voya Financial
DESCRIPTION: Candidate 401K with employer Great River Health Systems

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: Hon. Mariannette Jane Miller-Meeks , 10/23/2021