



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Marie Newman  
**Status:** Member  
**State/District:** IL03

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2020  
**Filing Date:** 08/10/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Acorn Moderately Aggressive Fund [MF]	SP	\$15,001 - \$50,000	Capital Gains	Not Applicable	None
BMO Harris Everyday Checking Account [BA]	DC	\$1,001 - \$15,000	None		
BMO Harris Everyday Checking Account [BA]		\$1,001 - \$15,000	None		
BMO Harris Interest Gold Checking Account [BA]	SP	\$100,001 - \$250,000	None		
BMO Harris Portfolio Checking Account [BA]	SP	\$15,001 - \$50,000	None		
BMO Harris Savings Account [BA]	DC	\$1,001 - \$15,000	None		
Charles Schwab JT TEN ⇒ Cash [BA]	JT	\$15,001 - \$50,000	Dividends	Not Applicable	\$1 - \$200
Charles Schwab JT TEN ⇒ Glenmede Quantitative U.S. Large Cap Growth Equity Portfolio [MF]	JT	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN					
Charles Schwab JT TEN ⇒ Moderna, Inc. (MRNA) [ST]	JT	\$1,001 - \$15,000	None		
Charles Schwab JT TEN ⇒ Pfizer, Inc. (PFE) [ST]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Charles Schwab JT TEN ⇒ Salesforce.com Inc (CRM) [ST]	JT	\$15,001 - \$50,000	None		
Charles Schwab JT TEN ⇒ The Consumer Staples Select Sector SPDR Fund [EF]	JT	\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN					
Charles Schwab JT TEN ⇒ Vanguard Small-Cap Index Fund [EF]	JT	\$1,001 - \$15,000	None		
DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN					
Fundrise ⇒ Fundrise [RE]	SP	\$100,001 - \$250,000	Dividends	Not Applicable	\$5,001 - \$15,000
Individual 401(K) ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)					
Individual 401(K) ⇒ Carnival Corporation (CCL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)					
Individual 401(K) ⇒ Cash [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)					
Individual 401(K) ⇒ Schwab U.S. Broad Market ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)					
Insperity 401K ⇒ SSGA Target Retire 2025 Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual Life Insurance [WU]	SP	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: James Newman Extra Ordinary Life					
Northwestern Mutual Life Insurance [WU]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: James Newman Extra Ordinary Life					
Northwestern Mutual Life Insurance [WU]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: James Newman Whole Life					
Northwestern Mutual Life Insurance [WU]	SP	\$50,001 - \$100,000	None		
DESCRIPTION: James Newman Whole Life					
Northwestern Mutual Life Insurance [WU]		\$100,001 - \$250,000	None		
DESCRIPTION: Marie Newman Adjustable CompLife					
Patch of Land [RE]	SP	\$100,001 - \$250,000	Interest	Not Applicable	\$5,001 - \$15,000
DESCRIPTION: real estate crowdsourcing					
PowerShares QQQ Trust, Series 1 [EF]	SP	\$15,001 - \$50,000	Capital Gains	Not Applicable	\$5,001 - \$15,000
Rollover IRA ⇒ Akebia Therapeutics, Inc. (AKBA) [ST]					
		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ Artisan International Fund Investor Class [MF]					
		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Best Buy Co., Inc. (BBY) [ST]					
	SP	\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ Carnival Corporation (CCL) [ST]					
	SP	\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ Cash [IH]					
	SP	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Rollover IRA ⇒ Cash [IH]					
	SP	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rollover IRA ⇒ Cash [IH]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Energy Select Sector SPDR Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Exxon Mobil Corporation (XOM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FedEx Corporation (FDX) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Rollover IRA ⇒ FedEx Corporation (FDX) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ Fidelity Freedom 2030 Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Financial Select Sector SPDR Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Hodges Small Cap Fund Retail Class [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Invesco QQQ Trust [EF]		\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ iShares MSCI EAFE Small-Cap ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ McDonald's Corporation (MCD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ Moderna, Inc. (MRNA) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ Netflix, Inc. (NFLX) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rollover IRA ⇒ Schwab S&P 500 Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ SPDR S&P 500 ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ The Real Estate Select Sector SPDR Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ United Airlines Holdings, Inc. (UAL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ Utilities Select Sector SPDR Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Vanguard Communication Services ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Vanguard Equity-Income Fund Admiral Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Walmart Inc. (WMT) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ Wayfair Inc. Class A (W) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ Wayfair Inc. Class A (W) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Rollover IRA ⇒ Zoom Video Communications, Inc. - Class A (ZM) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		
Strata Traditional IRA ⇒ Strata Traditional IRA [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		

\* 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
FIGO Pet Insurance LLC	Spouse Salary	N/A	N/A
Marie Newman for Congress Committee	Stipend	N/A	\$16,000.00
Marie Newman for Congress	Salary (W-2)	N/A	\$7,750.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Quicken Loans	2010	Home Mortgage, La Grange, IL	\$250,001 - \$500,000

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Marie Newman for Congress (LaGrange, IL, US)	Consulting

### SCHEDULE A ASSET CLASS DETAILS

- o Charles Schwab JT TEN (Owner: JT)  
LOCATION: US  
DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN
- o Fundrise (Owner: SP)  
LOCATION: US
- o Individual 401(K) (Owner: SP)  
DESCRIPTION: James D Newman Charles Schwab & Co Inc Cust James D Newman & Assoc 401(K)
- o Insperity 401K (Owner: SP)
- o Rollover IRA  
DESCRIPTION: Marie K Newman Charles Schwab & Co Inc Cust IRA Rollover
- o Rollover IRA (Owner: SP)

DESCRIPTION: James D Newman Charles Schwab & Co Inc Cust IRA Rollover

- o Strata Traditional IRA (Owner: SP)

## 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. Marie Newman , 08/10/2021