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Financial Disclosure Report

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Filer Information

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Status: Member
State/District: MI09

Filing Information

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Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
403B ⇒ Cref Stock R3 [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
403B ⇒ TIAA Access Lifecycle Fund 2025 [MF]	SP	$1 - $1,000	Tax-Deferred		☑
403B ⇒ TIAA Real Estate [MF]	SP	$1 - $1,000	Tax-Deferred		☑
403B ⇒ TIAA Traditional [MF]	SP	$50,001 - $100,000	Tax-Deferred		☑
529 College Savings Plan ⇒ 2022/2023 Enrollment Option [MF]	DC	$50,001 - $100,000	Tax-Deferred		☑
529 College Savings Plan ⇒ Moderate Allocation Option [MF]	DC	$15,001 - $50,000	Tax-Deferred		☑
AFL-CIO Staff Retirement Trust Fund [PE]		Undetermined	None		☐
Ally [BA]	JT	$50,001 - $100,000	Interest	$201 - $1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Emigrant Direct [BA]	JT	$1 - $1,000	Interest	None	☐
Emigrant Direct [BA]	DC	$1 - $1,000	Interest	None	☐
Genisys Credit Union [BA]	JT	$250,001 - $500,000	Interest	$1 - $200	☐
Lean and Green Michigan, LLC, 100% Interest [OL] LOCATION: Detroit / Wayne, MI, US DESCRIPTION: LAGM creates and executes public-private partnerships and market based programs to save companies money, eliminate waste, and drive the transformation to a sustainable economy. We work with a wide range of stakeholders - including multi-family, commercial, industrial and non-profit property owners, companies in the energy efficiency and renewable energy sectors, lenders and state and local governments - to develop solutions that move innovative energy projects forward.	SP	$500,001 - $1,000,000	Ordinary / Business	$100,001 - $1,000,000	☐
Levin Energy Partners, LLC, 100% Interest [OL] LOCATION: Detroit / Wayne, MI, US DESCRIPTION: Company owns 100% of Lean and Green Michigan, LLC	SP	None	None		☐
Schwab Brokerage [BA]	JT	$100,001 - $250,000	Interest	None	☑
Schwab Inherited IRA ⇒ American Fund Amcap [MF]		$15,001 - $50,000	Tax-Deferred		☑
Schwab Inherited IRA ⇒ American Fund Balanced [MF]		$15,001 - $50,000	Tax-Deferred		☑
Schwab Inherited IRA ⇒ American Fund Capital [MF]		$1,001 - $15,000	Tax-Deferred		☐
Schwab Inherited IRA ⇒ Cash [IH]		$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ Cash [IH]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ Cash [IH]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ Cash [IH]		$1 - $1,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Schwab IRA ⇒ Invesco Nasdaq 100 ETF [EF]		$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA ⇒ Invesco Nasdaq 100 ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA ⇒ Schwab US Large Cap ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ T. Rowe Price Emrg Europe [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Schwab IRA ⇒ Vanguard Dividend Appreciation ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☑
Schwab IRA ⇒ Vanguard Dividend Appreciation ETF [EF]		$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA ⇒ Vanguard FTSE All World Ex US [EF]		$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ Vanguard FTSE All World Ex US [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ Vanguard FTSE Developed Mkts ETF [EF]		$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ Vanguard FTSE Developed Mkts ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ Vanguard FTSE Emerging Markets ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ Vanguard FTSE Emerging Markets ETF [EF]		$1 - $1,000	Tax-Deferred		☐
Schwab IRA ⇒ Vanguard FTSE Emerging Markets ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Schwab IRA ⇒ Vanguard Mid Cap ETF [EF]		$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA ⇒ Vanguard Mid Cap ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Schwab IRA ⇒ Vanguard Real Estate [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA ⇒ Vanguard Real Estate [EF]		$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA ⇒ Vanguard S&P 500 ETF [EF]		$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA ⇒ Vanguard S&P 500 ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA ⇒ Vanguard Small Cap ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA ⇒ Vanguard Small Cap ETF [EF]		$1,001 - $15,000	Tax-Deferred		☑
Schwab IRA Rollover ⇒ Cash [IH]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab IRA Rollover ⇒ Dimensional US Core Equity ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab IRA Rollover ⇒ Schwab US Large Cap ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab IRA Rollover ⇒ US Treasury STRIPs [GS]	SP	$50,001 - $100,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Cash [IH]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Cash [IH]		$1 - $1,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Dimensional US Core Equity ETF [EF]		$1 - $1,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ SPDR Blmbrg Barclay Intl Trsry [EF]	SP	$1 - $1,000	Tax-Deferred		☑
Schwab Roth IRA ⇒	SP	$1 - $1,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
SPDR Blmbrg Intl Crp [EF]					
Schwab Roth IRA ⇒ Vanguard Dividend Appreciation ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Schwab Roth IRA ⇒ Vanguard Dividend Appreciation ETF [EF]		$1,001 - $15,000	Tax-Deferred		☑
Schwab Roth IRA ⇒ Vanguard FTSE All World Ex US [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Vanguard FTSE Developed Mkts ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Vanguard FTSE Emerging Markets ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Vanguard Mid Cap ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Vanguard Mid Cap ETF [EF]		$15,001 - $50,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Vanguard Real Estate [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Vanguard S&P 500 ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Schwab Roth IRA ⇒ Vanguard Small Cap ETF [EF]	SP	$1 - $1,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Vanguard Small Cap Growth ETF [EF]		$15,001 - $50,000	Tax-Deferred		☐
Schwab Roth IRA ⇒ Vanguard Small Cap Value ETF [EF]		$15,001 - $50,000	Tax-Deferred		☐
Schwab Solo 401k ⇒ Cash [IH]		$1 - $1,000	Tax-Deferred		☐
Schwab Solo 401k ⇒ Schwab US Large Cap ETF [EF]		$1 - $1,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Schwab Solo 401k ⇒ US Treasury STRIPs [GS]		$100,001 - $250,000	Tax-Deferred		☐
Series I Savings Bond [GS]		$1,001 - $15,000	Interest	None	☑
Series I Savings Bond [GS]	DC	$1,001 - $15,000	Interest	None	☑
Service Employees International Union [PE]		Undetermined	None		☐
Spindrift Partnership, LLP [RP] Location: Mantoloking / Ocean County, NJ, US	SP	$100,001 - $250,000	Rent	$2,501 - $5,000	☐
UTMA ⇒ Cash [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	☑

* 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 B: Transactions

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
403B ⇒ TIAA Access Lifecycle Fund 2025 [MF] Description: Sale for investment rebalancing	SP	07/21/2021	S (partial)	$1,001 - $15,000	☐
403B ⇒ TIAA Real Estate [MF] Description: Sale for investment rebalancing	SP	07/21/2021	S (partial)	$1,001 - $15,000	☐
403B ⇒ TIAA Traditional [MF] Description: Purchase from sale for rebalancing TIAA Real Estate and TIAA Lifecycle Funds	SP	07/21/2021	P	$1,001 - $15,000	
529 College Savings Plan ⇒ 2022/2023 Enrollment Option [MF] Description: Investment of deposit / contribution	DC	12/20/2021	P	$1,001 - $15,000	
529 College Savings Plan ⇒ 2022/2023 Enrollment Option [MF] Description: Investment of deposit / contribution	DC	12/22/2021	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
529 College Savings Plan ⇒ Cash [BA] DESCRIPTION: Deposit / contribution to account	DC	12/20/2021	P	$1,001 - $15,000	
529 College Savings Plan ⇒ Cash [BA] DESCRIPTION: Deposit / contribution	DC	12/22/2021	P	$1,001 - $15,000	
529 College Savings Plan ⇒ Moderate Allocation Option [MF] DESCRIPTION: Investment of deposit / contribution	DC	12/20/2021	P	$1,001 - $15,000	
529 College Savings Plan ⇒ Moderate Allocation Option [MF] DESCRIPTION: Investment of deposit / contribution	DC	12/22/2021	P	$1,001 - $15,000	
Cash [BA] DESCRIPTION: Deposit of cash to investment account from year end business draw	JT	12/27/2021	P	$50,001 - $100,000	
Cash [BA] DESCRIPTION: Deposit of cash to investment account from year end business draw	JT	12/31/2021	P	$50,001 - $100,000	
Schwab Inherited IRA ⇒ American Fund Amcap [MF] DESCRIPTION: Long term capital gain distribution / Dividend reinvestment		06/16/2021	P	$1,001 - $15,000	
Schwab Inherited IRA ⇒ American Fund Amcap [MF] DESCRIPTION: Long term capital gain distribution / Dividend reinvestment		12/15/2021	P	$1,001 - $15,000	
Schwab Inherited IRA ⇒ American Fund Balanced [MF] DESCRIPTION: Sale to generate cash for annual RMD		12/10/2021	S (partial)	$1,001 - $15,000	☐
Schwab IRA ⇒ Invesco Nasdaq 100 ETF [EF] DESCRIPTION: Investment of 2020 Contribution		07/23/2021	P	$1,001 - $15,000	
Schwab IRA ⇒ Invesco Nasdaq 100 ETF [EF] DESCRIPTION: Investment of 2020 contribution	SP	07/23/2021	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Schwab IRA ⇒ Vanguard Dividend Appreciation ETF [EF] DESCRIPTION: Investment of 2021 Annual Contribution		12/23/2021	P	$1,001 - $15,000	
Schwab IRA ⇒ Vanguard Dividend Appreciation ETF [EF] DESCRIPTION: Investment of 2021 annual contribution	SP	12/23/2021	P	$1,001 - $15,000	
Schwab IRA ⇒ Vanguard Mid Cap ETF [EF] DESCRIPTION: Investment of 2021 Annual Contribution		12/23/2021	P	$1,001 - $15,000	
Schwab IRA ⇒ Vanguard Real Estate [EF] DESCRIPTION: Investment of 2021 Annual Contribution		12/23/2021	P	$1,001 - $15,000	
Schwab IRA ⇒ Vanguard Real Estate [EF] DESCRIPTION: Investment of 2021 annual contribution	SP	12/23/2021	P	$1,001 - $15,000	
Schwab IRA ⇒ Vanguard S&P 500 ETF [EF] DESCRIPTION: Investment of 2021 Annual Contribution		12/23/2021	P	$1,001 - $15,000	
Schwab IRA ⇒ Vanguard S&P 500 ETF [EF] DESCRIPTION: Investment of 2021 annual contribution	SP	12/23/2021	P	$1,001 - $15,000	
Schwab IRA ⇒ Vanguard Small Cap ETF [EF] DESCRIPTION: Investment of 2021 Annual Contribution		12/23/2021	P	$1,001 - $15,000	
Schwab IRA ⇒ Vanguard Small Cap ETF [EF] DESCRIPTION: Investment of 2021 annual contribution	SP	12/23/2021	P	$1,001 - $15,000	
Schwab Roth IRA ⇒ SPDR Blmbrg Barclay Intl Trsry [EF] DESCRIPTION: Sale for investment rebalancing	SP	12/23/2021	S (partial)	$1,001 - $15,000	☐
Schwab Roth IRA ⇒ SPDR Blmbrg Intl Crp [EF] DESCRIPTION: Sale for investment rebalancing	SP	12/23/2021	S (partial)	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Schwab Roth IRA ⇒ Vanguard Dividend Appreciation ETF [EF] DESCRIPTION: Investment of accumulated cash		07/23/2021	P	$1,001 - $15,000	
Schwab Roth IRA ⇒ Vanguard Dividend Appreciation ETF [EF] DESCRIPTION: Investment rebalancing	SP	12/23/2021	P	$1,001 - $15,000	
Schwab Roth IRA ⇒ Vanguard S&P 500 ETF [EF] DESCRIPTION: Investment rebalancing	SP	12/23/2021	P	$1,001 - $15,000	
Series I Savings Bond [GS]	DC	12/27/2021	P	$1,001 - $15,000	
Series I Savings Bond [GS]		12/27/2021	P	$1,001 - $15,000	
UTMA ⇒ Cash [BA] DESCRIPTION: Transfer of cash from bank account for account consolidation	DC	03/9/2021	P	$1,001 - $15,000	

* 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
Corporation for a Skilled Workforce	Spouse Salary	N/A
Lean and Green Michigan	Spouse Salary	N/A
Schwab Inherited IRA	Required Minimum Distribution	$3,287.40

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Congressional Federal Credit Union	October 18, 2019	Home Mortgage	$250,001 - $500,000
JT	Congressional Federal Credit Union	March 1, 2021	Home Mortgage	$250,001 - $500,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
February 2007	AFL-CIO Staff Retirement Trust Fund	February 2007 was end of employment but there is a remaining deferred vested monthly pension benefit available in 2025
February 1996	Service Employees International Union	February 1996 was end of employment but there is a remaining deferred vested monthly pension benefit available in 2025

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

None disclosed.

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Asset Class Details

- 403B (Owner: SP)
- 529 College Savings Plan (Owner: DC)
  Location: MI
- Schwab Inherited IRA
- Schwab IRA (Owner: SP)
- Schwab IRA
- Schwab IRA Rollover (Owner: SP)
- Schwab Roth IRA
- Schwab Roth IRA (Owner: SP)
- Schwab Solo 401k
- UTMA (Owner: DC)

Exclusions of Spouse, Dependent, or Trust Information

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

○ Yes ◉ No

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. Andy Levin , 05/16/2022