



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Nikki Budzinski  
**Status:** Congressional Candidate  
**State/District:** IL13

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2021  
**Filing Date:** 05/13/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|----------------|-------------------------------|-----------------------|
| Budzinski & Partners LLC ⇒<br>Checking Account [BA]                          |       | \$1,001 - \$15,000  | None           |                               |                       |
| Budzinski & Partners LLC ⇒<br>Savings Account [BA]                           |       | \$15,001 - \$50,000 | Interest       | \$1 - \$200                   | \$1 - \$200           |
| Individual Single Account ⇒<br>AMERICAN BALANCED A (ABALX) [MF]              |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>AMERICAN CAP WRLD GRW & INC A (CWGIX)<br>[MF] |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>AMERICAN FUNDAMENTAL INV A (ANCFX)<br>[MF]    |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>AMERICAN GROWTH FD OF AMER A (AGTHX)<br>[MF]  |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>AMERICAN NEW ECONOMY A (ANEFX) [MF]           |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |

| Asset  | Owner | Value of Asset        | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| Individual Single Account ⇒<br>AMERICAN NEW PERSPECTIVE A (ANWPX)<br>[MF]        |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>AMERICAN WASH MUTUAL INV A (AWSHX)<br>[MF]        |       | \$15,001 - \$50,000   | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>Cash [BA]   |       | \$100,001 - \$250,000 | None           |                               |                       |
| Individual Single Account ⇒<br>JH FNDM LARGE CAP CORE A (TAGRX) [MF]             |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>JPMORGAN EQUITY INCOME A (OIEIX) [MF]             |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>JPMORGAN LARGE CAP GROWTH A (OLGAX)<br>[MF]       |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>JPMORGAN MID CAP EQUITY A (JCMAX) [MF]            |       | \$15,001 - \$50,000   | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>JPMORGAN SMALL CAP BLEND A (VSCOX)<br>[MF]        |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| Individual Single Account ⇒<br>LAKE CNTY IL SCH DIST GO<br>(LAKECOSCH33Z34) [GS] |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| JP Morgan Chase Bank Accounts [BA]   |       | \$50,001 - \$100,000  | Interest       | \$1 - \$200                   | \$1 - \$200           |
| Rental Property, Chicago IL [RP]<br><br>LOCATION: Chicago, IL, US                |       | \$250,001 - \$500,000 | Rent           | \$15,001 - \$50,000           | None                  |
| Roth IRA-1 ⇒<br>AMERICAN AMCAP A (AMCPX) [MF]                                    |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |
| Roth IRA-1 ⇒<br>AMERICAN CAP WRLD GRW & INC A (CWGIX)                            |       | \$1,001 - \$15,000    | Tax-Deferred   |                               |                       |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| [MF]   |              |                       |                       |                                      |                              |
| Roth IRA-1 ⇒<br>AMERICAN FUNDAMENTAL INV A (ANCFX)<br>[MF]           |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Roth IRA-1 ⇒<br>AMERICAN GROWTH FD OF AMER A (AGTHX)<br>[MF]         |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Roth IRA-1 ⇒<br>AMERICAN NEW WORLD A (NEWFX) [MF]                    |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Roth IRA-1 ⇒<br>HARTFORD CAP APPRECIATION A (ITHAX)<br>[MF]          |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Roth IRA-1 ⇒<br>INVESCO COMSTOCK A (ACSTX) [MF]                      |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN AMCAP A (AMCPX) [MF]                 |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN CAP WRLD GRW & INC A (CWGIX)<br>[MF] |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN EUROPACIFIC GROWTH A<br>(AEPGX) [MF] |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN FUNDAMENTAL INV A (ANCFX)<br>[MF]    |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN HIGH-INCOME TRUST A (AHITX)<br>[MF]  |              | \$1 - \$1,000         | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN INC FUND OF AMER A (AMECX)<br>[MF]   |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN INVEST CO OF AMER A (AIVSX)<br>[MF]  |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |

| <b>Asset</b>  | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Traditional IRA-1 ⇒<br>AMERICAN NEW ECONOMY A (ANEFX) [MF]        |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN NEW PERSPECTIVE A (ANWPX) [MF]    |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN SMALLCAP WORLD A (SMCWX) [MF]     |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>AMERICAN WASH MUTUAL INV A (AWSHX) [MF]    |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>JPMORGAN LARGE CAP GROWTH A (OLGAX) [MF]   |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>JPMORGAN MID CAP EQUITY A (JCMAX) [MF]     |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>JPMORGAN MID CAP GROWTH A (OSGIX) [MF]     |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>JPMORGAN MID CAP VALUE A (JAMCX) [MF]      |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Traditional IRA-1 ⇒<br>JPMORGAN SMALL CAP BLEND A (VSCOX) [MF]    |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Traditional IRA-2 ⇒<br>AMERICAN AMCAP A (AMCPX) [MF]              |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-2 ⇒<br>AMERICAN BALANCED A (ABALX) [MF]           |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| Traditional IRA-2 ⇒<br>AMERICAN CAPITAL WORLD BOND A (CWBFX) [MF] |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Traditional IRA-2 ⇒   |              | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |

| Asset   | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------|----------------|-------------------------------|-----------------------|
| AMERICAN GROWTH FD OF AMER A (AGTHX)<br>[MF]                        |       |                     |                |                               |                       |
| Traditional IRA-2 ⇒<br>AMERICAN HIGH-INCOME TRUST A (AHITX)<br>[MF] |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Traditional IRA-2 ⇒<br>AMERICAN NEW ECONOMY A (ANEFX) [MF]          |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Traditional IRA-2 ⇒<br>AMERICAN SMALLCAP WORLD A (SMCWX)<br>[MF]    |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Traditional IRA-2 ⇒<br>AMERICAN WASH MUTUAL INV A (AWSHX)<br>[MF]   |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Traditional IRA-2 ⇒<br>JPMORGAN MID CAP EQUITY A (JCMAX) [MF]       |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Wells Fargo Bank Accounts [BA]                                      |       | \$1,001 - \$15,000  | Interest       | \$1 - \$200                   | \$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 C: EARNED INCOME

| Source                                | Type                | Amount Current Year to Filing | Amount Preceding Year |
|---------------------------------------|---------------------|-------------------------------|-----------------------|
| Climate Jobs National Resource Center | consulting fee      | \$45,000.00                   | \$150,000.00          |
| Emily's List                          | Consulting Services |                               | \$59,000.00           |
| Union Insurance Group                 | Board of Directors  |                               | \$24,000.00           |
| Kilbride for Supreme Court            | Consulting Services | N/A                           | \$41,250.00           |
| Curry & Associates                    | Consulting Services |                               | \$82,810.00           |
| 1630 Fund                             | Consulting Service  |                               | \$60,000.00           |
| New Venture Fund                      | Consulting Services |                               | \$48,000.00           |
| East Jackson LLC                      | Consulting          |                               | \$23,166.00           |
| State of Illinois                     | Government Services |                               | \$29,999.00           |

| Source                    | Type                       | Amount Current Year to Filing | Amount Preceding Year |
|---------------------------|----------------------------|-------------------------------|-----------------------|
| Dewey Square              | Consulting Services        |                               | \$40,000.00           |
| Defense Finance Actg Serv | Federal Government Service | \$94,000.00                   | N/A                   |

## SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type   | Amount of Liability   |
|-------|----------|---------------|--|-----------------------|
|       | PNC Bank | April 2019    | Renting Chicago residence, January 1, 2021- March 31, 2022 | \$250,001 - \$500,000 |

## SCHEDULE E: POSITIONS

| Position           | Name of Organization  |
|--------------------|-----------------------|
| Board of Directors | Union Insurance Group |

## SCHEDULE F: AGREEMENTS

| Date       | Parties To   | Terms of Agreement    |
|------------|--|-----------------------|
| May 2008   | United Food and Commercial Worker International Union Pension Plan for Employees | Employee pension plan |
| March 2000 | State Employees Retirement System  | Employee Pension Fund |

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

| Source (Name and Address)                                | Brief Description of Duties |
|--|-----------------------------|
| Climate Jobs National Resource Center (New York, NY, US) | Consulting Services         |
| East Jackson LLC (Chicago, IL, US)                       | Consulting Services         |
| Curry & Associates (Springfield, IL, US)                 | Consulting Services         |
| State of Illinois (Chicago, IL, US)                      | Government Services         |
| Union Insurance Group (Chicago, IL, US)                  | Board of Directors          |
| Climate Jobs Illinois (Springfield, IL, US)              | Consulting Services         |
| Kilbride for Supreme Court (Rock Island, IL, US)         | Consulting Services         |

| Source (Name and Address)               | Brief Description of Duties |
|---|-----------------------------|
| 1630 Fund (Washington , DC, US)         | Consulting Services         |
| Dewey Square Group (Washington, DC, US) | Consulting Services         |
| Emily's List (Washington, DC, US)       | Consulting Services         |
| New Venture (Washington, DC, US)        | Consulting Services         |

## SCHEDULE A ASSET CLASS DETAILS

- o Budzinski & Partners LLC  
LOCATION: US
- o Individual Single Account
- o Roth IRA-1
- o Traditional IRA-1
- o Traditional IRA-2

## 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:** Nikki Budzinski , 05/13/2022