



Filing ID #10050199

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Lisa C. McClain  
**Status:** Member  
**State/District:** MI10

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 08/12/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab 401K ⇒ Polen Capital Growth [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab Brokerage Account ⇒ Charles Schwab Savings Account [MF]	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Congress Asset Management Company ⇒ Congress Mid Cap Growth Fund [MF] DESCRIPTION: Coverdell ESA	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Credit Union One [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Hantz Group [PS] DESCRIPTION: Company Growth Stock	SP	\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
Mass Mutual 401K ⇒ American Century Mid Cap Value [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mass Mutual 401K ⇒ Clearbridge Large Cap Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Mass Mutual 401K ⇒ Clearbridge Mid Cap Growth [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mass Mutual 401K ⇒ Invesco International [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mass Mutual 401K ⇒ Janus Henderson Tritus Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Mass Mutual 401K ⇒ JP Morgan US Equity Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Mass Mutual 401K ⇒ MM Russell 2000 Small Cap Index [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mass Mutual 401K ⇒ Victory Integrity Small Cap Value [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Mass Mutual 401K (Spouse) ⇒ 401(K) Clearbridge Large Cap Growth Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Mass Mutual 401K (Spouse) ⇒ Janus Henderson Tritus Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mass Mutual 401K (Spouse) ⇒ Victory Integrity Small Cap Value [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Nationwide Variable Universal Life [WU]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>

\* 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

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Hantz Financial Services	Spouse Salary	\$250,000.00
Hantz Group	Spouse Profit Sharing	\$200,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Chase Bank	March 2019	Automobile Loan	\$15,001 - \$50,000
JT	Credit Union One	November 2021	Home Equity Loan	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

- Charles Schwab 401K (Owner: SP)
- Charles Schwab Brokerage Account (Owner: JT)  
LOCATION: US
- Congress Asset Management Company (Owner: DC)  
LOCATION: MI, US  
DESCRIPTION: Coverdell Education Savings Account
- Mass Mutual 401K
- Mass Mutual 401K (Spouse) (Owner: SP)

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. Lisa C. McClain , 08/12/2022