Filing ID #10055335

Financial Disclosure Report

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Filer Information

Name: Hon. Greg Stanton
Status: Member
State/District: AZ04

Filing Information

Filing Type: Amendment Report
Filing Year: 2021
Filing Date: 08/10/2023

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Capital Group American Funds ⇒ Capital Income Builder (CIRAX) [5P] Location: AZ	DC	$1,001 - $15,000	Dividends	$1 - $200	
Capital Group American Funds ⇒ Capital Income Builder (CIRAX) [5P] Location: AZ	DC	$15,001 - $50,000	Dividends	$201 - $1,000	
Capital Group American Funds ⇒ Capital World Growth and Income Fund (CWIAX) [5P] Location: AZ	DC	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	
Capital Group American Funds ⇒ Capital World Growth and Income Fund (CWIAX) [5P] Location: AZ	DC	$15,001 - $50,000	Capital Gains, Dividends	$201 - $1,000	
Capital Group American Funds ⇒ The Growth Fund of America - 529A (CGFAX) [5P] Location: AZ	DC	$15,001 - $50,000	Capital Gains, Dividends	$1 - $200	
Capital Group American Funds ⇒ The Growth Fund of America (CGFAX) [5P] Location: AZ	DC	$15,001 - $50,000	Capital Gains, Dividends	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Harvest Health and Recreation Inc Employee Stock Options [OP]	SP	Undetermined	None		
DESCRIPTION: Stock option as part of compensation package. Asset is currently inaccessible due to duration of employment requirement.					
Nationwide 401(a) Plan ⇒ American Funds 2035 Trgt Date Retire T6 RFFTX [MF]		$100,001 - $250,000	Tax-Deferred		
Nationwide 457(b) Plan ⇒ American Funds 2035 Trgt Date Retire T6 RFFTX [MF]		$50,001 - $100,000	Tax-Deferred		
Nationwide 457(b) Plan ⇒ City of Phoenix Stable Income Fund [MF]		$1,001 - $15,000	Tax-Deferred		
Nationwide Post Employment Health Plan ⇒ Nationwide Post Employment Health Plan [BA]		$1,001 - $15,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ Russell Growth Strategy Fund (RALAX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ Russell Growth Strategy Fund (RALCX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Randy Taylor Consulting 401K Plan (ABG Rocky Mountain) ⇒ ABG Balanced CIF R [MF]	SP	None	None		
COMMENTS: Spouse's company 401K program was eliminated at the end of 2021. The proceeds were used to purchase TD Ameritrade IRA accounts on January 4, 2022.					
Randy Taylor Consulting 401K Plan (ABG Rocky Mountain) ⇒ ABG Growth CIF R [MF]	SP	None	None		
COMMENTS: Spouse's company 401K program was eliminated at the end of 2021. The proceeds were used to purchase TD Ameritrade IRA accounts on January 4, 2022.					
State of Arizona Elected Officials Pension [PE]		Undetermined	Tax-Deferred		
DESCRIPTION: Value of pension determined upon retirement					
Vanguard 401(k) ⇒ NW Z NYSE AT 100 IS [MF]	SP	$50,001 - $100,000	Tax-Deferred		
Vanguard 401(k) ⇒ Vanguard Equity Income Fund Adm [MF]	SP	$100,001 - $250,000	Tax-Deferred		
Vanguard 401(k) ⇒	SP	$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Vanguard Small-Cap Growth Idx Inst [MF]					
Vanguard 401(k) ⇒ Vanguard Target Retirement 2035 [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Vanguard 401(k) ⇒ Vanguard Total Bond Mkt Index Inst [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Vanguard 401(k) ⇒ Vanguard Total Stock Mkt Idx Inst [MF]	SP	$100,001 - $250,000	Tax-Deferred		
Wells Fargo Checking [BA]		$1,001 - $15,000	None		
Wells Fargo Checking [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	
Wells Fargo Savings [BA]		$1,001 - $15,000	Interest	$1 - $200	
Wells Fargo Savings [BA]	SP	$15,001 - $50,000	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?
Randy Taylor Consulting 401K Plan (ABG Rocky Mountain) ⇒ ABG Balanced CIF R [MF]	SP	12/23/2021	S	$50,001 - $100,000	
Comments: Spouse's company 401K program was eliminated at the end of 2021. The proceeds were used to purchase TD Ameritrade IRA accounts on January 4, 2022.					
Randy Taylor Consulting 401K Plan (ABG Rocky Mountain) ⇒ ABG Growth CIF R [MF]	SP	12/23/2021	S	$15,001 - $50,000	
Comments: Spouse's company 401K program was eliminated at the end of 2021. The proceeds were used to purchase TD Ameritrade IRA accounts on January 4, 2022.					

* 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
Randy Taylor Consulting	Spouse salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	US Department of Education	August 1992	Student Loans	$10,000 - $15,000
	SoFi	May 2017	Personal Loan	$15,001 - $50,000
JT	Bank of America	June 2013	Home Mortgage	$500,001 - $1,000,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
February 2000	Myself and the State of Arizona	Value determined upon retirement

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

- Capital Group American Funds (Owner: DC)
  Location: AZ
- Nationwide 401(a) Plan
- Nationwide 457(b) Plan
- Nationwide Post Employment Health Plan
  Location: US
- Northwestern Mutual IRA (Owner: SP)
- Randy Taylor Consulting 401K Plan (ABG Rocky Mountain) (Owner: SP)

DESCRIPTION: Spouse employee 401K plan

- Vanguard 401(k) (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. Greg Stanton , 08/10/2023