



FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Shri Thanedar
Status: Congressional Candidate
State/District: MI13

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 04/19/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alphabet Inc. - Class A (GOOGL) [ST]		\$100,001 - \$250,000	None		
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$250,001 - \$500,000	None		
Amazon.com, Inc. (AMZN) [ST]		\$100,001 - \$250,000	None		
American Express Company (AXP) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Apollo Global Management, Inc. (APO) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	None
Apple Inc. (AAPL) [ST]		\$500,001 - \$1,000,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
ARK Innovation ETF (ARKK) [ST]		\$15,001 - \$50,000	Capital Gains	None	\$201 - \$1,000
Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
		\$250,000			
Biogen Inc. (BIIB) [ST]		\$1,001 - \$15,000	None		
Blackstone Inc. (BX) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Cash - Investment Accounts [BA]		\$250,001 - \$500,000	Interest	\$1 - \$200	\$1 - \$200
Coherus BioSciences, Inc. (CHRS) [ST]		\$15,001 - \$50,000	None		
Coinbase Global, Inc. - Class A (COIN) [ST]		\$1,001 - \$15,000	None		
COMPASS Pathways Plc - American Depository Shares (CMPS) [ST]		\$1,001 - \$15,000	None		
DFAC [EF]		\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
DFAX [EF]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	\$5,001 - \$15,000
DFEOX [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$15,001 - \$50,000
DFEVX [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
DFIEX [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$201 - \$1,000	\$15,001 - \$50,000
DFLVX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
DFQTX [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$50,001 - \$100,000
DFSVX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$201 - \$1,000	\$15,001 - \$50,000
DFTIX [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DFUSX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$15,001 - \$50,000
DGSIX [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$50,001 - \$100,000
DIPSX [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
DISVX [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
DRIJX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
EFV [EF]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$2,501 - \$5,000
IAU [EF]		\$1,000,001 - \$5,000,000	None		
ITOT [EF]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
JD.com, Inc. - American Depositary Shares (JD) [ST]		\$1,001 - \$15,000	None		
KE Holdings Inc American Depositary Shares (BEKE) [ST]		\$1,001 - \$15,000	None		
KKR & Co. Inc. (KKR) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Microsoft Corporation (MSFT) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
PJTX [MF]		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$1 - \$200
Starbucks Corporation (SBUX) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
TCEHY [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Tencent Music Entertainment Group American Depositary Shares, each representing two Class A Ordinary (TME) [ST]		\$1,001 - \$15,000	None		
Tesla, Inc. (TSLA) [ST]		\$50,001 - \$100,000	None		
The Carlyle Group Inc. (CG) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1 - \$200
TIP [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
VAIPX [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
VASGX [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	None	\$100,001 - \$1,000,000
VBIAX [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$50,001 - \$100,000
VBR [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
VBTLX [MF]		\$100,001 - \$250,000	Capital Gains, Interest	\$1,001 - \$2,500	\$2,501 - \$5,000
VCMDX [MF]		\$100,001 - \$250,000	None		
VDE [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
VEMAX [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
VFIAX [MF]		\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
VGSLX [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
VGT [EF]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VOO [EF]		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
VSIAX [MF]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
VSMGX [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	None	\$50,001 - \$100,000
VT [EF]		\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
VTAPX [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
VTI [EF]		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
VTIAX [MF]		\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$15,001 - \$50,000
VTSAX [MF]		\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
VTV [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
VTWAX [MF]		\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Walmart Inc. (WMT) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

* 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
State of Michigan	State Representative	\$40,000.00	\$90,000.00
COMMENTS: total is best guess and includes estimation of salary and any expense reimbursement.			

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Stock Portfolio	Dividends, stock appreciations	\$50,000.00	\$100,000.00
COMMENTS: These amounts are my best estimates			
Commercial properties	Rent	\$100,000.00	\$200,000.00
COMMENTS: These are my best estimates			

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Old National Bank	2018	Mortgage Loan	\$1,000,001 - \$5,000,000
	UBS Credit Card	On Going balance in the account	Credit Card Purchases	\$15,001 - \$50,000
	TriState Capital Bank	December 2021 - Present	Line of Credit Against Investment Account	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Avomeen Analytical Services
Director	Project Healthy Community
Trustee	Shri Thanedar Living Trust
Trustee	Collateral Trust
Trustee	Thanedar Neil Irrev Trust
Trustee	Thanedar Samir Irrev Trust

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
State of Michigan (Lansing, MI, US)	State Representative

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

COMMENTS

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: Shri Thanedar , 04/19/2022