



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Mark Deluzio
Status: Congressional Candidate
State/District: AZ02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 05/11/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America Checking Acct# 0000 0420 9257 [BA]		\$50,001 - \$100,000	Interest	Not Applicable	\$1 - \$200
Bank of America Savings Acct# 0094 9166 4303 [BA]		\$1,001 - \$15,000	Interest	Not Applicable	None
Heartland Value Fund Investor Acct# 460646 [MF]		\$1,001 - \$15,000	Capital Gains	Not Applicable	\$201 - \$1,000
Ironwood Fund SI II LP, 1% Interest [OL]		\$1,001 - \$15,000	Capital Gains	Not Applicable	\$15,001 - \$50,000
LOCATION: Avon, CT, US DESCRIPTION: Private Equity Fund - Capital Gains from 2021 Schedule K					
Ironwood Fund SI LP, 1% Interest [OL]		\$1,001 - \$15,000	Capital Gains	Not Applicable	\$15,001 - \$50,000
LOCATION: Avon, CT, US DESCRIPTION: Capital Gain \$25,360 per Schedule K1					
Lean Horizons Consulting, LLC, 100% Interest [OL]		\$250,001 - \$500,000	Net Income generated from business	Not Applicable	\$100,001 - \$1,000,000
LOCATION: Scottsdale, AZ, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Net Income of \$502,596 also reported in Schedule C - EARNED INCOME					
Morgan Stanley IRA Accounts ⇒ AB HIGH INCOME A (AGDAX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ AB HIGH INCOME ADV (AGDYX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ ALLSPRING COMMON STK A (SCSAX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$15,001 - \$50,000	None		
Morgan Stanley IRA Accounts ⇒ ALLSPRING COMMON STK INST (SCNSX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$100,001 - \$250,000	None		
Morgan Stanley IRA Accounts ⇒ ALLSPRING EMERG MKTS EQ A (EMGAX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ CASH Morgan Stanley IRA Accounts - Acct# 235-155735- 895 [IH]	JT	\$100,001 - \$250,000	None		
Morgan Stanley IRA Accounts ⇒ COLUMBIA SELECT LG CAP VAL A (SLVAX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$15,001 - \$50,000	None		
Morgan Stanley IRA Accounts ⇒ COLUMBIA SELECT LG CAP VAL I (CSVZX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$100,001 - \$250,000	None		
Morgan Stanley IRA Accounts ⇒ FIDELITY ADV HIGH INC ADV 1 (FAHCX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$100,001 - \$250,000	None		
Morgan Stanley IRA Accounts ⇒ FIDELITY ADV HIGH INC ADV A (FAHDX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ General Electric Company (GE) [ST]	JT	\$50,001 - \$100,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley IRA Accounts ⇒ INVESCO QQQ TRUST SERIES I (QQQ) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [EF]	JT	\$50,001 - \$100,000	None		
Morgan Stanley IRA Accounts ⇒ ISHARES IBOXX HY COR BD ETF (HYG) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [EF]	JT	\$15,001 - \$50,000	None		
Morgan Stanley IRA Accounts ⇒ ISHARES RUSSELL 1000 GRW ETF (IWF) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [EF]	JT	\$50,001 - \$100,000	None		
Morgan Stanley IRA Accounts ⇒ ISHARES RUSSELL 2000 ETF (IWM) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [EF]	JT	\$50,001 - \$100,000	None		
Morgan Stanley IRA Accounts ⇒ ISHARES RUSSELL 2000 VALUE ETF (IWN) - Acct# 235- 155177-895 [EF]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ ISHARES RUSSELL 2000 VALUE ETF (IWN) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [EF]	JT	\$100,001 - \$250,000	None		
Morgan Stanley IRA Accounts ⇒ JP MORGAN LARGE CAP GROWTH I (SEEGX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$50,001 - \$100,000	None		
Morgan Stanley IRA Accounts ⇒ JP MORGAN LARGE CAP GRW A (OLGAX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$15,001 - \$50,000	None		
Morgan Stanley IRA Accounts ⇒ JP MORGANSTRAT INC OPPORT I (JSOSX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$100,001 - \$250,000	None		
Morgan Stanley IRA Accounts ⇒ LORD ABBETT BOND DEB F (LBDFX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$250,001 - \$500,000	None		
Morgan Stanley IRA Accounts ⇒ Lord Abbett SHT Duration INC (LDLFX) Morgan Stanley IRA Account Acct# 235-051672-895 [MF]	JT	\$15,001 - \$50,000	None		
Morgan Stanley IRA Accounts ⇒ LORD ABBETT SHT DURATION INC A (LALDX) Morgan	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Stanley IRA Accounts - Acct# 235-155177-895 [MF]					
Morgan Stanley IRA Accounts ⇒ LORD ABBETT SHT DURATION INC F (LDLFX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$250,001 - \$500,000	None		
Morgan Stanley IRA Accounts ⇒ LORD ABBETT TOTAL RETURN F (LTRFX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$15,001 - \$50,000	None		
Morgan Stanley IRA Accounts ⇒ Morgan StanlALLSPRING EMERG MKTS EQ INST (EMGNX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$50,001 - \$100,000	None		
Morgan Stanley IRA Accounts ⇒ Morgan Stanley IRA Accounts - Cash Acct# 235-050954-895 [IH]	JT	\$15,001 - \$50,000	Interest	Not Applicable	Not Applicable
Morgan Stanley IRA Accounts ⇒ Morgan Stanley IRA Accounts - Cash Acct# 235-051672-895 [IH]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ Morgan Stanley IRA Accounts - Cash Acct# 235-155177-895 [IH]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ PIMCO INVEST GRADE CRED BD A (PBDAX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ PIMCO INVEST GRADE CRED BD I2 (PBDPX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$50,001 - \$100,000	None		
Morgan Stanley IRA Accounts ⇒ PIMCO LOW DURATION A (PTLAX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ PIMCO LOW DURATION I2 (PLDPX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$100,001 - \$250,000	None		
Morgan Stanley IRA Accounts ⇒ PUTNAM GROWTH OPPORTUNITIES A (POGAX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$50,001 - \$100,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley IRA Accounts ⇒ PUTNAM GROWTH OPPTY Y (PGOYX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$50,001 - \$100,000	None		
Morgan Stanley IRA Accounts ⇒ SPDR S&P DIVIDEND (SDY) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [EF]	JT	\$100,001 - \$250,000	None		
Morgan Stanley IRA Accounts ⇒ SPDR S&P MIDCAP 400 ETF TRUST (MDY) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [EF]	JT	\$50,001 - \$100,000	None		
Morgan Stanley IRA Accounts ⇒ TEMPLETON FOREIGN FUND A 9TEMFX) Morgan Stanley IRA Accounts - Acct# 235-155177-895 [MF]	JT	\$1,001 - \$15,000	None		
Morgan Stanley IRA Accounts ⇒ TEMPLETON FOREIGN FUND ADV (TFFAX) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [MF]	JT	\$50,001 - \$100,000	None		
Morgan Stanley IRA Accounts ⇒ Vanguard Bond Market Fund (BND) Morgan Stanley IRA Acct# 235-051672-895 [EF]	JT	\$15,001 - \$50,000	None		
Morgan Stanley IRA Accounts ⇒ VANGUARD SHORT TERM BND (BSV) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [EF]	JT	\$100,001 - \$250,000	None		
Morgan Stanley IRA Accounts ⇒ VANGUARD TOTAL BOND MARKET (BND) Morgan Stanley IRA Accounts - Acct# 235-155735-895 [EF]	JT	\$100,001 - \$250,000	None		

* 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
Lean Horizons Consulting, LLC	Consulting profits from revenue after expenses	N/A	\$502,596.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	American Express	4th Quarter 2021	Credit Card Debt	\$15,001 - \$50,000
	Various 1099 Consultants	4th Quarter 2021	Consulting Fees and reimbursable travel expenses	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
President & CEO	Lean Horizons Consulting, LLC

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
Cargill (Wayzata, MI, US)	Consulting Services - Lean Horizons Consulting, LLC
Front Street Capital Management (Missoula, MT, US)	Consulting Services - Lean Horizons Consulting, LLC
Milacron (Batavia, OH, US)	Consulting Services - Lean Horizons Consulting, LLC
OF Mossberg & Sons, Inc. (New Haven, CT, US)	Consulting Services - Lean Horizons Consulting, LLC
Phicooustic Systems (HK) Ltd (Hong Kong, CN)	Consulting Services - Lean Horizons Consulting, LLC
Plymouth Tube (Warrenville, IL, US)	Consulting Services - Lean Horizons Consulting, LLC
Wabash National (Lafayette, IN, US)	Consulting Services - Lean Horizons Consulting, LLC
Becton Dickenson (Franklin Lakes, NJ, US)	Consulting Services - Lean Horizons Consulting, LLC
Biohaven Pharma (New Haven, CT, US)	Consulting Services - Lean Horizons Consulting, LLC
Catalent CSS (Somerset, NJ, US)	Consulting Services - Lean Horizons Consulting, LLC
Collabera (Bernards, NJ, US)	Consulting Services - Lean Horizons Consulting, LLC

Source (Name and Address)	Brief Description of Duties
ITT Endine (Orchard Park, NY, US)	Consulting Services - Lean Horizons Consulting, LLC
Kitchen Aid Small Appliances (Benton Harbor, MI, US)	Consulting Services - Lean Horizons Consulting, LLC
Knorr Brake Company (Westminister, MD, US)	Consulting Services - Lean Horizons Consulting, LLC
Sarapeta Therapeutics, Inc. (Cambridge, MA, US)	Consulting Services - Lean Horizons Consulting, LLC
Tenth Avenue Holdings (New York City, NY, US)	Consulting Services - Lean Horizons Consulting, LLC
Vertex Pharma (Boston, MA, US)	Consulting Services - Lean Horizons Consulting, LLC

SCHEDULE A ASSET CLASS DETAILS

- o Morgan Stanley IRA Accounts (Owner: JT)

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: Mark Deluzio , 05/11/2022