



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Kirsten Engel
Status: Congressional Candidate
State/District: AZ06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 05/16/2022
Period Covered: 01/01/2021– 04/16/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Amgen Inc. (AMGN) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
Bank of America Corporation (BAC) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Fidelity Cash Account [BA]	JT	\$250,001 - \$500,000	Interest	\$201 - \$1,000	\$201 - \$1,000
JP Morgan Chase & Co. (JPM) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
Personal residential rental property located in Tucson, AZ [RP]	JT	\$500,001 - \$1,000,000	Rent	None	\$5,001 - \$15,000
LOCATION: Tucson/Pima, AZ, US					
COMMENTS: 2021: Occasional rental of guesthouse attached to residence owned by filer and her spouse. Note: The personal residence reported here is the same as the personal residence owned by the Family Revocable Trust and also declared under this schedule.					
Saleska-Engel Family Revocable Trust [RE]	JT	\$500,001 - \$1,000,000	None		
DESCRIPTION: Family revocable trust holding title to the personal residence of the filer and her husband in Arizona together with unimproved property in Michigan.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COMMENTS: The filer and her spouse are joint beneficiaries of the revocable family trust.					
SEP-IRA [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Brookfield Infrastructure Partners LP Limited Partnership Units (BIP)					
SEP-IRA [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Fidelity Government Cash Reserves					
SEP-IRA [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: SPDR Gold Trust					
Starbucks Corporation (SBUX) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
Tulane University Faculty and Administrative Retirement Plan [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: TIAA Traditional					
Tulane University Faculty and Administrative Retirement Plan [MF]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: CREF Social Choice					
Tulane University Faculty and Administrative Retirement Plan [MF]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: CREF Bond Market					
Tulane University Faculty and Administrative Retirement Plan [MF]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: CREF Global Equities					
Tulane University Faculty and Administrative Retirement Plan [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: TIAA Real Estate Fund					
Tulane University Faculty and Administrative Retirement Plan [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: TIAA-CREF Real Estate Securities Fund - Retirement Class					
University of Arizona 403b Plan [MF]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Fidelity Contrafund K6					
University of Arizona 403b Plan [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Vanguard Total Bond Market Index Fund Institutional Shares					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
University of Arizona 403b Plan [MF] DESCRIPTION: Fidelity Government Cash Reserves		\$50,001 - \$100,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: Deer Park Total Return Credit Fund		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: Eventide Gilead Fund Class I		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: Fidelity Select Utilities Portfolio		\$50,001 - \$100,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: AlphaCentric Income Opportunities Fund Class I		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: Lord Abbett Short Duration Income Fund Class I		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: Vanguard Federal Money Market Fund	SP	\$100,001 - \$250,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Fidelity Government Cash Reserves		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [EF] DESCRIPTION: iShares MSCI Global Min Vol Factor		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Fidelity Capital and Income Fund		\$50,001 - \$100,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Fidelity Select Consumer Staples Portfolio		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Permanent Portfolio Class I		\$50,001 - \$100,000	Tax-Deferred		
University of Arizona ORP [EF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Invesco ETF DWA Staples					
University of Arizona ORP [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: First Trust NASDAQ Clean Edge Green Energy Index Fund					
University of Arizona ORP [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: MassMutual Mid Cap Growth Fund Class I					
University of Arizona ORP [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Vanguard Total Bond Market Index Fund Institutional Shares					
University of Arizona ORP [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Martin Currie Emerging Markets Fund Class FI					
University of Arizona ORP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Vanguard Total Bond Market Index Fund Institutional Shares					
University of Arizona ORP [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Eventide Gilead Class I					
University of Arizona ORP [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: iShares MSCI USA Min Vol Factor ETF					
University of Arizona ORP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Fidelity® Select Medical Technology and Devices Portfolio					
University of Arizona ORP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: BlackRock Multi-Asset Income Portfolio Investor A Shares					
University of Arizona ORP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Alger Small Cap Focus Fund Class I					
University of Arizona ORP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Fidelity Government Cash Reserves					
Wells Fargo Checking Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

* 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
University of Arizona	Salary	\$44,379.20	\$160,725.11
University of Arizona	Spouse's salary	N/A	N/A
Northern Kentucky University	Honoraria		\$750.00
State of Arizona Department of Administration	Salary	\$.00	\$16,892.36
COMMENTS: Salary for my position as Arizona State Senator Jan - Sept 2021.			

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Bank N.A.	January 2018	Mortgage on personal residence with attached guesthouse that was used for rental income during 2021	\$250,001 - \$500,000
COMMENTS: The filer is listing the mortgage on her personal residence because she and her spouse rented out the guesthouse attached to the personal residence for income during 2021. Date listed refers to date we began renting attached guesthouse. Property was purchased in 2004 and used solely as a personal residence prior to this date.				
JT	Fairway Independent Mortgage Corporation	May 2021	Mortgage on personal residence with attached guesthouse that was used for rental income in 2021.	\$250,001 - \$500,000
COMMENTS: The filer is listing the mortgage on her personal residence because she and her spouse rented out the guesthouse attached to the personal residence for income during 2021. The filer and spouse refinanced the mortgage on their personal residence in 2021. As a result four different lenders held the mortgage during 2021: Wells Fargo Bank N.A., Fairway Independent Mortgage Corporation, Flagstar Bank FSB, and M&T Bank.				
JT	Flagstar Bank FSB	June 2021	Mortgage on personal residence with attached guesthouse that was used for rental income in 2021.	\$250,001 - \$500,000
COMMENTS: The filer is listing the mortgage on her personal residence because she and her spouse rented out the guesthouse attached to the personal residence for income during 2021. The filer and spouse refinanced the mortgage on their personal residence in 2021. As a result four different lenders held the mortgage during 2021: Wells Fargo Bank N.A., Fairway Independent Mortgage Corporation, Flagstar Bank FSB, and M&T Bank.				
JT	M&T Bank	November 2021	Mortgage on personal residence with attached guesthouse that was used for rental income during 2021	\$500,001 - \$1,000,000
COMMENTS: The filer is listing the mortgage on her personal residence because she and her spouse rented out the guesthouse attached to the personal residence for income during 2021. The filer and spouse refinanced the mortgage on their personal residence in 2021. As a result four different lenders held the mortgage during 2021: Wells Fargo Bank N.A., Fairway Independent Mortgage Corporation,				

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Flagstar Bank FSB, and M&T Bank.			

SCHEDULE E: POSITIONS

Position	Name of Organization
Arizona State Senator COMMENTS: January 2021 - September 2021	Arizona State Senate
Arizona State Representative COMMENTS: Position held Jan 2020 - Jan 2021	Arizona House of Representatives
Faculty member	University of Arizona College of Law
Legal Advisory Board member	Tulane Environmental Law Clinic

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

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: Kirsten Engel , 05/16/2022