



Filing ID #10054557

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Lisa C. McClain  
**Status:** Member  
**State/District:** MI09

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 08/10/2023

## 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	\$250,001 - \$500,000	Capital Gains, Interest	\$50,001 - \$100,000	<input type="checkbox"/>
Clearbridge Large Cap Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Clearbridge Mid Cap Growth [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Congress Mid Cap Growth Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Credit Union One [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Hantz Group [PS]  DESCRIPTION: Dvidends	SP	\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
Janus Henderson Tritus Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Janus Henderson Tritus Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
JP Morgan US Equity Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
MM Russell 2000 Small Cap Index [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Nationwide Indexed Universal Life [WU]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Nationwide Variable Universal Life [WU]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Polen International [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Thrift Savings Plan [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Victory Integrity Small Cap Value [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Victory Integrity Small Cap Value [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab Savings Account [MF]	JT	12/5/2022	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Charles Schwab Savings Account [MF]	JT	08/9/2022	S (partial)	\$15,001 - \$50,000	<input checked="" 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 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
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

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Young America's Foundation	09/24/2022	09/25/2022	Detroit, MI - Santa Barbara, California - Detroit, MI	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>Charles Schwab 401K (Owner: SP)</li><li>Charles Schwab Brokerage Account (Owner: JT) LOCATION: US</li></ul>
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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 , 08/10/2023