



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Nikki Budzinski  
**Status:** Congressional Candidate  
**State/District:** IL13

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2022  
**Filing Date:** 12/14/2023  
**Period Covered:** 01/01/2021– 04/30/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Budzinski & Partners LLC ⇒ Budzinski & Partners LLC [OL]  LOCATION: Springfield, IL, US DESCRIPTION: Consulting Services		\$1,001 - \$15,000	Business services rendered	\$50,001 - \$100,000	\$15,001 - \$50,000
Individual Single Account ⇒ American Balanced A (ABALX) [MF]		\$1,001 - \$15,000	None		
Individual Single Account ⇒ AMERICAN CAP WRLD GRW & INC A (CWGIX) [MF]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Individual Single Account ⇒ AMERICAN FUNDAMENTAL INV A (ANCFX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1,001 - \$2,500
Individual Single Account ⇒ American Funds American Mutual Fund Class A (AMRMX) [MF]		None	Capital Gains	None	\$1,001 - \$2,500
Individual Single Account ⇒ American Funds Capital Income Builder Class A (CAIBX) [MF]		None	Capital Gains	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual Single Account ⇒ AMERICAN GROWTH FD OF AMER A (AGTHX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Individual Single Account ⇒ AMERICAN NEW ECONOMY A (ANEFX) [MF]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Individual Single Account ⇒ AMERICAN NEW PERSPECTIVE A (ANWPX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
Individual Single Account ⇒ AMERICAN WASH MUTUAL INV A (AWSHX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Individual Single Account ⇒ Cash [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Individual Single Account ⇒ Caterpillar, Inc. (CAT) [ST]		None	Capital Gains	None	\$1,001 - \$2,500
Individual Single Account ⇒ CVS Health Corporation (CVS) [ST]		None	Capital Gains	None	\$201 - \$1,000
Individual Single Account ⇒ Home Depot, Inc. (HD) [ST]		None	Capital Gains	None	\$1,001 - \$2,500
Individual Single Account ⇒ JH FNDM LARGE CAP CORE A (TAGRX) [MF]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Individual Single Account ⇒ JPMORGAN EQUITY INCOME A (OIEIX) [MF]		\$1,001 - \$15,000	None		
Individual Single Account ⇒ JPMORGAN LARGE CAP GROWTH A (OLGAX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1,001 - \$2,500
Individual Single Account ⇒ JPMORGAN LARGE CAP GROWTH A (OLGAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Individual Single Account ⇒ JPMORGAN MID CAP EQUITY A (JCMAX) [MF]		\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
Individual Single Account ⇒ JPMORGAN SMALL CAP BLEND A (VSCOX) [MF]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual Single Account ⇒ LAKE CNTY IL SCH DIST GO (LAKECOSCH33Z34) [GS]		\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
Individual Single Account ⇒ Procter & Gamble Company (PG) [ST]		None	Capital Gains	None	\$201 - \$1,000
Individual Single Account ⇒ The Hartford Capital Appreciation Fund Class A (ITHAX) [MF]		None	Capital Gains	None	\$201 - \$1,000
JP Morgan Chase Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Rental Property [RP]  LOCATION: Chicago/Cook, IL, US DESCRIPTION: Residential		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
Roth IRA-1 ⇒ AMERICAN AMCAP A (AMCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA-1 ⇒ AMERICAN CAP WRLD GRW & INC A (CWGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA-1 ⇒ AMERICAN FUNDAMENTAL INV A (ANCFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA-1 ⇒ AMERICAN GROWTH FD OF AMER A (AGTHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA-1 ⇒ AMERICAN NEW WORLD A (NEWFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA-1 ⇒ HARTFORD CAP APPRECIATION A (ITHAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA-1 ⇒ INVESCO COMSTOCK A (ACSTX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
State Employees' Retirement System of Illinois [DB]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Traditional IRA-1 ⇒ AMERICAN AMCAP A (AMCPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN CAP WRLD GRW & INC A (CWGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN EUROPACIFIC GROWTH A (AEPGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN FUNDAMENTAL INV A (ANCFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN HIGH-INCOME TRUST A (AHITX) [MF]		\$1 - \$1,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN INC FUND OF AMER A (AMECX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN INVEST CO OF AMER A (AIVSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN NEW ECONOMY A (ANEFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN NEW PERSPECTIVE A (ANWPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN SMALLCAP WORLD A (SMCWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN WASH MUTUAL INV A (AWSHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ JPMORGAN LARGE CAP GROWTH A (OLGAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ JPMORGAN MID CAP EQUITY A (JCMAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ JPMORGAN MID CAP GROWTH A (OSGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Traditional IRA-1 ⇒ JPMORGAN MID CAP VALUE A (JAMCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ JPMORGAN SMALL CAP BLEND A (VSCOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN AMCAP A (AMCPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN BALANCED A (ABALX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN CAPITAL WORLD BOND A (CWBFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN GROWTH FD OF AMER A (AGTHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN HIGH-INCOME TRUST A (AHITX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN NEW ECONOMY A (ANEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN SMALLCAP WORLD A (SMCWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN WASH MUTUAL INV A (AWSHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-2 ⇒ JPMORGAN MID CAP EQUITY A (JCMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
United Food and Commercial Worker International Union Pension Plan [DB]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Bank Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Budzinski & Partners, LLC	Consulting	\$74,250.00	\$154,600.00
Defense Finance Actg Serv	Federal Government Service	N/A	\$93,485.25

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Middletown State Bank	October 2021	Mortgage on personal residence	\$250,001 - \$500,000
	PNC Bank	April 2019	Mortgage on rental property	\$250,001 - \$500,000
	COMMENTS: Paid in full May 2022			

### SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors	Union Insurance Group

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2008	United Food and Commercial Worker International Union Pension Plan for Employees	Employee pension plan
March 2000	State Employees' Retirement System of Illinois	Employee Pension System

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

Source (Name and Address)	Brief Description of Duties
Climate Jobs National Resource Center (New York, NY, US)	Consulting Services
Curry & Associates LLC (Springfield, IL, US)	Consulting Services
Union Insurance Group (Chicago, IL, US)	Board of Directors

Source (Name and Address)	Brief Description of Duties
Climate Jobs Illinois (Springfield, IL, US)	Consulting Services
Kilbride for Supreme Court (Rock Island, IL, US)	Consulting Services
1630 Fund (Washington, DC, US)	Consulting Services
Dewey Square Group (Washington, DC, US)	Consulting Services
Emily's List (Washington, DC, US)	Consulting Services
New Venture Fund (Washington , DC, US)	Consulting Services

## SCHEDULE A ASSET CLASS DETAILS

- Budzinski & Partners LLC  
LOCATION: US
- Individual Single Account
- Roth IRA-1
- Traditional IRA-1
- Traditional IRA-2

## 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:** Hon. Nikki Budzinski , 12/14/2023