Filing ID #10062655

Financial Disclosure Report

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

Filer Information

Name: Hon. Bradley S. Schneider
Status: Member
State/District: IL10

Filing Information

Filing Type: Amendment Report
Filing Year: 2022
Filing Date: 08/10/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
01 - CIBC, Winnetka, IL ⇒ Checking Account [BA]	JT	$100,001 - $250,000	Interest	$1 - $200	☐
03 - Fifth-Third Bank, Northbrook, IL ⇒ Checking Account [BA]		$1,001 - $15,000	None		☐
04N - Fidelity Brokerage Account (JT-E) ⇒ Fidelity Government Money Market (SPAXX) [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	☐
05N - Fidelity Brokerage Account (KPL) ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]	SP	Spouse/DC Over $1,000,000	Dividends	$201 - $1,000	☐
05N - Fidelity Brokerage Account (KPL) ⇒ Fidelity Government Money Market (SPAXX) [BA]	SP	$100,001 - $250,000	Dividends	$1,001 - $2,500	☐
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income (EIF) [HE]	SP	$500,001 - $1,000,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ T Rowe Price Capital Appreciation I Class (TRAIX) [MF]	SP	$100,001 - $250,000	Capital Gains, Dividends	$5,001 - $15,000	☐
06N - Fidelity Brokerage Account (JST-E) ⇒ iShares Core Growth Allocation (AOR) [EF]	SP	$500,001 - $1,000,000	Dividends	$15,001 - $50,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
06N - Fidelity Brokerage Account (JST-E) ⇒ Relative Value Partners Disciplined ETF All Equity (EIF) [HE]	SP	Spouse/DC Over $1,000,000	Capital Gains, Dividends	$100,001 - $1,000,000	
06N - Fidelity Brokerage Account (JST-E) ⇒ Sequoia Fund Inc (SEQUX) [MF]	SP	None	None		✓
06N - Fidelity Brokerage Account (JST-E) ⇒ SPDR Ssga Global Allocation ETF (GAL) [EF]	SP	$250,001 - $500,000	Dividends, Interest	$5,001 - $15,000	
06N - Fidelity Brokerage Account (JST-E) ⇒ T Rowe Price Capital Appreciation I Class (TRAIX) [EF]	SP	$250,001 - $500,000	Capital Gains, Dividends	$15,001 - $50,000	
08N - Fidelity Brokerage Account (JST-M) ⇒ Fidelity Government Money Market (SPAXX) [BA]	SP	$15,001 - $50,000	Dividends	$201 - $1,000	
08N - Fidelity Brokerage Account (JST-M) ⇒ Relative Value Partners Fixed Income (EIF) [HE]	SP	Spouse/DC Over $1,000,000	Capital Gains, Dividends, Interest	$50,001 - $100,000	
08N - Fidelity Brokerage Account (JST-M) ⇒ Vanguad Total Bond Market Index Admiral (VBTLX) [MF]	SP	None	Capital Gains, Dividends	$5,001 - $15,000	✓
09 - Fidelity Brokerage Account ⇒ Fidelity Government Money Market (SPAXX) [BA]	JT	$1 - $1,000	Dividends	$1 - $200	
09 - Fidelity Brokerage Account ⇒ HL SFV iCapital Access Fund, L.P. (EIF) [HE]	JT	$250,001 - $500,000	None		
10 - Fidelity Brokerage Account - Rollover IRA ⇒ Relative Value Partners Balance Strategy (EIF) [HE]		$250,001 - $500,000	Tax-Deferred		
11 - Fidelity Brokerage Account - Rollover IRA (S) ⇒ Relative Value Partners Balance Strategy (EIF) [HE]	SP	Spouse/DC Over $1,000,000	Tax-Deferred		
12 - Fidelity Brokerage Account (JST) ⇒ Fidelity Government Money Market (SPAXX) [BA]	SP	$250,001 - $500,000	Dividends	$2,501 - $5,000	
12 - Fidelity Brokerage Account (JST) ⇒ Relative Value Partners Absolute Return Strategy (EIF) [HE]	SP	$500,001 - $1,000,000	Capital Gains, Dividends, Interest	$50,001 - $100,000	
14 - Schwab Brokerage Account - Roth IRA ⇒ Allspring C&B Large Cap (CBEAX) [MF]		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
14 - Schwab Brokerage Account - Roth IRA ⇒ American Beacon Large Cap (AAGPX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
14 - Schwab Brokerage Account - Roth IRA ⇒ American Century Growth (TCWGX) [MF]		$50,001 - $100,000	Tax-Deferred		☐
14 - Schwab Brokerage Account - Roth IRA ⇒ Carillon Clarivest International Fund (EISIX) [MF]		$15,001 - $50,000	Tax-Deferred		☑
14 - Schwab Brokerage Account - Roth IRA ⇒ Cash [BA]		$1 - $1,000	Tax-Deferred		☐
14 - Schwab Brokerage Account - Roth IRA ⇒ Hartford Schroders Emerging (SEMVX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
14 - Schwab Brokerage Account - Roth IRA ⇒ Highland Global Alloc Fund (HGLB) [MF]		$1,001 - $15,000	Tax-Deferred		☐
14 - Schwab Brokerage Account - Roth IRA ⇒ Madison SM Cap Fd (Formerly Broadview Oppty Fd) (BVAOX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
14 - Schwab Brokerage Account - Roth IRA ⇒ Manning & Napier World Oppy (EXWAX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
14 - Schwab Brokerage Account - Roth IRA ⇒ Northern Small Cap Value (NOSGX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
14 - Schwab Brokerage Account - Roth IRA ⇒ Schwab MarketTrack All Equity Portfolio (SWEG) [MF]		$15,001 - $50,000	Tax-Deferred		☐
17N - Fidelity - Brokerage Account - IRA (CD-EX) ⇒ Relative Value Partners Durable Opportunities (EIF) [HE]	SP	Spouse/DC Over $1,000,000	Tax-Deferred		☐
20N - Fidelity - Brokerage Account - IRA (ADNEX) ⇒ Relative Value Partners Low Equity Fund (EIF) [HE]	SP	Spouse/DC Over $1,000,000	Tax-Deferred		☑
21N - Fidelity - Brokerage Account - IRA (AD-EX) ⇒ Relative Value Partners Disciplined ETF (EIF) [HE]	SP	Spouse/DC Over $1,000,000	Tax-Deferred		☐
23 - Life Insurance ⇒ Lincoln Financial Universal Policy [WU]		$100,001 - $250,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
24 - MDRJB Investment Partnership, LLC ⇒ Fifth Third Bank [BA]		$1,001 - $15,000	None		
24 - MDRJB Investment Partnership, LLC ⇒ Medical Related Investments, LLC [OL] Location: Schaumburg, IL, US Description: Investment company with interest in company operating regional freestanding MRI centers		$15,001 - $50,000	None		
24 - MDRJB Investment Partnership, LLC ⇒ Middleton Logan Investors, LLC [OL] Location: Northbrook, IL, US Description: LLC owns commercial real estate.		$15,001 - $50,000	None		
24 - MDRJB Investment Partnership, LLC ⇒ Middleton Milwaukee LLC [OL] Location: Northbrook, IL, US Description: LLC owns office building in Milwaukee, WI		$15,001 - $50,000	Rent	$1,001 - $2,500	
24 - MDRJB Investment Partnership, LLC ⇒ Middleton Park Place, LLC [OL] Location: Northbrook, IL, US Description: Investment in office building, Minnesota		$1,001 - $15,000	None		
24 - MDRJB Investment Partnership, LLC ⇒ Middleton Tallgrass, LLC [OL] Location: Northbrook, IL, US Description: Investment in LLC owning office building Northbrook, IL		None	Rent	$201 - $1,000	
24 - MDRJB Investment Partnership, LLC ⇒ Next Reality Fund VIII LP [HE] Description: Excepted Investment Fund (EIF).		$1,001 - $15,000	Rent	$201 - $1,000	
24 - MDRJB Investment Partnership, LLC ⇒ Sherman Real Estate Fund XI (Real Estate, Multiple Locations) (EIF) [HE]		$1 - $1,000	Capital Gains, Rent	$15,001 - $50,000	
24 - MDRJB Investment Partnership, LLC ⇒ Sherman Real Estate Fund XII (Real Estate, Multiple Locations) (EIF) [HE]		$1,001 - $15,000	Capital Gains, Interest, Rent	$15,001 - $50,000	
24 - MDRJB Investment Partnership, LLC ⇒ Generation 3 LP (Private Equity, Northbrook, IL) ⇒ G3: EZ WA Tech, LLC [OL] Location: Louisville, KY, US Description: eCommerce Video Surveillance		$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
25 - Other Individual Investments ⇒ M Financial Holding (Insurance, Portland, OR) [OL] LOCATION: Portland, OR, US DESCRIPTION: Life insurance distribution company. Stock redeemed September 2022		None	Dividends	$5,001 - $15,000	✓
25 - Other Individual Investments ⇒ Questek International, LLC [OL] LOCATION: Evanston, IL, US DESCRIPTION: Questek International, LLC, is the holding company and sole owner of Questek Innovations, LLC, a Integrated Computational Materials Engineering (ICME) company.		$1,001 - $15,000	Interest, Ordinary business income	$1,001 - $2,500	
25 - Other Individual Investments ⇒ Rental Property (Single Family Home, Deerfield, IL) [RP] LOCATION: Deerfield / Lake, IL, US		$250,001 - $500,000	Rent	$5,001 - $15,000	
25 - Other Individual Investments ⇒ Spaulding Associates (SP) [OL] LOCATION: Bannockburn, IL, US DESCRIPTION: Residual interest in liquidated insurance agency		$1 - $1,000	Interest, Ordinary Business Income	$201 - $1,000	
25-S Other Individual Investments Spouse ⇒ 1147 Jackson LLC [OL] LOCATION: Chicago, IL, US DESCRIPTION: Limited Partnership interest in real estate development LLC for multi family development in Chicago, IL	SP	$50,001 - $100,000	Ordinary Business Income	$15,001 - $50,000	
25-S Other Individual Investments Spouse ⇒ AeroDirect [OL] LOCATION: Wheeling, IL, US DESCRIPTION: Operating interest in aircraft parts reseller	SP	$50,001 - $100,000	Dividends, Interest, Ordinary business income	$5,001 - $15,000	
25-S Other Individual Investments Spouse ⇒ Aerodirect Fund IV [CS] DESCRIPTION: Promissory Note from aircraft parts reseller	SP	$15,001 - $50,000	Interest, Ordinary Business Income	$5,001 - $15,000	
25-S Other Individual Investments Spouse ⇒ Alliant Holdings LP [OL] LOCATION: San Diego, CA, US DESCRIPTION: Insurance brokerage.	SP	Spouse/DC Over $1,000,000	None		
26 - CD Family Investment Partnership ⇒ 304 Owner LLC [HE] DESCRIPTION: Fund investing in apartment complexes in West Lafayette, IN	SP	$1,001 - $15,000	None		
26 - CD Family Investment Partnership ⇒ Banner Essex Strategic Apartment Fund II, LLC	SP	None	Capital Gains, Rent	$15,001 - $50,000	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
(Summermill at Falls River Apartments) [OL] LOCATION: Raleigh, NC, US DESCRIPTION: Fund investing in multifamily apartments					
26 - CD Family Investment Partnership ⇒ Banner Essex Strategic Apartment Fund II, LLC (Wellington at Willow Bend Apartments) [OL] LOCATION: Plano, TX, US DESCRIPTION: Fund investing in multifamily apartments	SP	$1,001 - $15,000	None		☐
26 - CD Family Investment Partnership ⇒ Cash - Fifth Third - Money Market [BA]	SP	$50,001 - $100,000	Dividends, Interest	$1 - $200	☐
26 - CD Family Investment Partnership ⇒ Connect and Sell, (Private Investment) [OL] LOCATION: Northbrook, IL, US DESCRIPTION: Sales Force Technology Company Los Gatos, CA 95030	SP	$1,001 - $15,000	None		☐
26 - CD Family Investment Partnership ⇒ Enclave at Winghaven UI, LLC (Real Estate, O'Fallon, MO) [OL] LOCATION: O'Fallon, MO, US DESCRIPTION: LLC owning multi family property in O'Fallon, MO.	SP	None	Rent	$5,001 - $15,000	☐
26 - CD Family Investment Partnership ⇒ Greenway Apartments LP (Real Estate, Carol Stream, IL) [OL] LOCATION: Carol Stream, IL, US DESCRIPTION: LLC Owning multi-family property in Carol Steam, IL	SP	None	Rent	$1,001 - $2,500	☐
26 - CD Family Investment Partnership ⇒ Paradise for Paws [OL] LOCATION: Chicago, IL, US DESCRIPTION: Company operating Pet Hotels	SP	None	Capital Gains	$5,001 - $15,000	☐
26 - CD Family Investment Partnership ⇒ Questek International, LLC [OL] LOCATION: Evanston, IL, US DESCRIPTION: Questek International, LLC, is the holding company and sole owner of Questek Innovations, LLC, a Integrated Computational Materials Engineering (ICME) company.	SP	$1 - $1,000	None		☐
26 - CD Family Investment Partnership ⇒ Relative Value Partners Balance Strategy (EIF) [HE]	SP	$250,001 - $500,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	☐
26 - CD Family Investment Partnership ⇒ Rock Rose Capital Fund I, LLC [HE]	SP	$1,001 - $15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
DESCRIPTION: Fund investing in mutli-family real estate properties in Houston, TX, Memphis, TN, St. Louis, MO and Jackson, MI					
26 - CD Family Investment Partnership ⇒ Sherman Real Estate Fund X (Real estate, multiple locations) (EIF) [HE] DESCRIPTION: Fund investing in multifamily apartments	SP	None	Capital Gains, Rent	$1,001 - $2,500	
26 - CD Family Investment Partnership ⇒ Sherman Real Estate Fund XII (Real Estate, Multiple Locations) (EIF) [HE] DESCRIPTION: Fund investing in multifamily apartments	SP	$1,001 - $15,000	Capital Gains, Rent	$15,001 - $50,000	
26 - CD Family Investment Partnership ⇒ Sherman Real Estate Fund XIII (Real Estate, Multiple Locations) (EIF) [HE]	SP	$1,001 - $15,000	None		
26 - CD Family Investment Partnership ⇒ Sterling Venture Partners, LP (EIF) [HE]	SP	$1,001 - $15,000	None		
26 - CD Family Investment Partnership ⇒ Trigran Investments, LP II (Northbrook, IL investment fund, EIF) [HE]	SP	$100,001 - $250,000	None		
26 - CD Family Investment Partnership ⇒ Westchester Apartments, LLC (Real Estate, Northbrook, IL) [OL] LOCATION: Northbrook, IL, US DESCRIPTION: Investment in multifamily apartment building	SP	None	Capital Gains, Interest, Rent	$50,001 - $100,000	✓
27 - CDFT ⇒ 10 Owner LLC (EIF) [HE] DESCRIPTION: Fund investing in apartment buildings in West Lafayette, IN	SP	$1,001 - $15,000	Capital Gains, Rent	$5,001 - $15,000	
27 - CDFT ⇒ AeroDirect Fund IV [DO] DESCRIPTION: Reseller of airplane parts	SP	$15,001 - $50,000	Interest, Ordinary Business Income	$2,501 - $5,000	
27 - CDFT ⇒ Hayes Owner, LLC (EIF) [HE] DESCRIPTION: Fund investing in apartment buildings in West Lafayette, IN	SP	$1,001 - $15,000	None		
27 - CDFT ⇒ Sherman Real Estate Fund XIV, LLC (EIF) [HE] DESCRIPTION: Real estate fund, multiple locations	SP	$1,001 - $15,000	None		
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒	SP	$100,001 -	Capital Gains,	$2,501 -	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Bahl and Gaynor Income Growth Strategy (EIF) [HE]		$250,000	Dividends, Interest	$5,000	
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒ Cash [BA]	SP	$100,001 - $250,000	Interest	$2,501 - $5,000	
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒ Congress Asset Management (EIF) [HE]	SP	$15,001 - $50,000	Capital Gains, Dividends, Interest	$201 - $1,000	
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒ Geneva Small Cap Growth [HE]	SP	$15,001 - $50,000	Capital Gains, Dividends, Interest	$1 - $200	
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒ Harding Loevner International Equity ADR (EIF) [HE]	SP	$15,001 - $50,000	Capital Gains, Dividends, Interest	$201 - $1,000	
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒ HL SFV iCapital Access Fund, L.P. (EIF) [HE]	SP	$15,001 - $50,000	None		
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒ Lazard Intl Equity Select ADR (EIF) [HE]	SP	$15,001 - $50,000	Capital Gains, Dividends	$201 - $1,000	
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒ Relative Value Partners Balance Strategy (EIF) [HE]	SP	$250,001 - $500,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒ Silvercrest Asset Management Small Cap Value UMA (EIF) [HE]	SP	$15,001 - $50,000	Dividends, Interest	$201 - $1,000	
27 - MSSB BROKERAGE ACCOUNT (CDFT) ⇒ Thompson Siegel Walmsley Mid Value (EIF) [HE]	SP	$15,001 - $50,000	Capital Gains, Dividends, Interest	$1,001 - $2,500	

* Investment vehicle 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?
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	06/6/2022	P	$50,001 - $100,000	
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	10/24/2022	S (partial)	$15,001 - $50,000	✓

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	09/15/2022	S (partial)	$15,001 - $50,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	06/30/2022	S (partial)	$50,001 - $100,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	06/13/2022	S (partial)	$50,001 - $100,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	06/1/2022	S (partial)	$50,001 - $100,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	04/27/2022	S (partial)	$15,001 - $50,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	04/26/2022	S (partial)	$15,001 - $50,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	04/22/2022	S (partial)	$250,001 - $500,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	04/1/2022	S (partial)	$50,001 - $100,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	02/18/2022	S (partial)	$15,001 - $50,000	☑
05N - Fidelity Brokerage Account (KPL) ⇒ Relative Value Partners Fixed Income [HE]	SP	01/13/2022	S (partial)	$100,001 - $250,000	☑
06N - Fidelity Brokerage Account (JST-E) ⇒ Sequoia Fund Inc (SEQUX) [MF]	SP	03/22/2022	S	$250,001 - $500,000	☐
08N - Fidelity Brokerage Account (JST-M) ⇒ Vanguard Total Bond Market Index Admiral (VBTLX) [MF]	SP	06/7/2022	S	$100,001 - $250,000	☑
14 - Schwab Brokerage Account - Roth IRA ⇒ Carillon Clarivest Intl (EISIX) [MF]		07/15/2022	E	$15,001 - $50,000	
DESCRIPTION: Received shares of Carillon Clarivest Intl (EISIX) in exchange for Carillon Scout International Fund (UMBWX) as a result of merger.					
17N - Fidelity - Brokerage Account - IRA (CD-EX) ⇒ Relative Value Partners Durable Opportunities [HE]	SP	12/23/2022	S (partial)	$50,001 - $100,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
20N - Fidelity - Brokerage Account - IRA (ADNEX) ⇒ Relative Value Partners Low Equity Fund [HE]	SP	12/23/2022	S (partial)	$50,001 - $100,000	☐
20N - Fidelity - Brokerage Account - IRA (ADNEX) ⇒ Relative Value Partners Low Equity Fund [HE]	SP	12/23/2022	S (partial)	$15,001 - $50,000	☐
20N - Fidelity - Brokerage Account - IRA (ADNEX) ⇒ Relative Value Partners Low Equity Fund [HE]	SP	06/30/2022	S (partial)	$15,001 - $50,000	☐
20N - Fidelity - Brokerage Account - IRA (ADNEX) ⇒ Relative Value Partners Low Equity Income [HE]	SP	09/14/2022	S (partial)	$15,001 - $50,000	☐
25 - Other Individual Investments ⇒ M Financial Holding (MFH), (Insurance, Portland, OR) [PS] LOCATION: US DESCRIPTION: Life insurance distribution company		09/16/2022	S	$50,001 - $100,000	☐
25 - Other Individual Investments ⇒ MZ Capital Mundelein, LLC [OI] DESCRIPTION: Multifamily Development		09/20/2022	P	$100,001 - $250,000	
26 - CD Family Investment Partnership ⇒ Banner Essex Strategic Apartment Fund II, LLC (Summermill at Falls River Apartments) [OL] LOCATION: Chicago, IL, US DESCRIPTION: Apartment property sold April 2022	SP	04/1/2022	S	$50,001 - $100,000	☑
26 - CD Family Investment Partnership ⇒ MZ Capital Mundelein, LLC [OI] DESCRIPTION: Multifamily Development	SP	09/20/2022	P	$1,001 - $15,000	
26 - CD Family Investment Partnership ⇒ Westchester Apartments, LLC [OL] LOCATION: Northbrook, IL, US DESCRIPTION: Investment in multifamily apartment building	SP	08/3/2022	S	$500,001 - $1,000,000	☑

* Investment vehicle 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
Alliant Insurance Services	Spouse Salary	N/A

Davis Dann Adler Schneider	Income from insurance policies sold prior to 2003	$20,207.63

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Huntington Bank	December 2021	Mortgage	$1,000,001 - $5,000,000
JT	5/3 Bank	May 2017	Mortgage on Primary Home	$250,001 - $500,000

Schedule E: Positions

Position	Name of Organization
Advisory Board	Civic Leadership Foundation
Honorary Co-Chair	Third Way
United States Holocaust Memorial Council (Board of Trustees)	United States Holocaust Memorial Museum
Comments: Appointed by House of Representatives	

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?
American Israel Education Foundation	02/19/2022	02/27/2022	Chicago - Tel Aviv - Chicago	0	☑	☑	☑
Mark and Melissa Spellman	12/9/2022	12/11/2022	Wheeling, IL - Detroit, MI - Wheeling, IL	2	☐	☐	☑
Climate Solutions Foundation	11/9/2022	11/13/2022	Chicago, Illinois USA - Sharm al Shaq, Egypt - Chicago, Illinois USA	0	☑	☑	☐

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- 01 - CIBC, Winnetka, IL (Owner: JT)
  Location: US
- 03 - Fifth-Third Bank, Northbrook, IL
  Location: US
- 04N - Fidelity Brokerage Account (JT-E) (Owner: JT)
  Location: US
- 05N - Fidelity Brokerage Account (KPL) (Owner: SP)
  Location: US
- 06N - Fidelity Brokerage Account (JST-E) (Owner: SP)
  Location: US
- 08N - Fidelity Brokerage Account (JST-M) (Owner: SP)
  Location: US
- 09 - Fidelity Brokerage Account (Owner: JT)
  Location: US
- 10 - Fidelity Brokerage Account - Rollover IRA
- 11 - Fidelity Brokerage Account - Rollover IRA (S) (Owner: SP)
- 12 - Fidelity Brokerage Account (JST) (Owner: SP)
  Location: US
- 14 - Schwab Brokerage Account - Roth IRA
- 17N - Fidelity - Brokerage Account - IRA (CD-EX) (Owner: SP)
  Location: US
- 20N - Fidelity - Brokerage Account - IRA (ADNEX) (Owner: SP)
  Location: US
  Description: Replaces Mesirow Account IRA (ADNEX)
- 21N - Fidelity - Brokerage Account - IRA (AD-EX) (Owner: SP)
  Location: US
- 23 - Life Insurance
  Location: US
- 24 - MDRJB Investment Partnership, LLC
  Location: US
- 24 - MDRJB Investment Partnership, LLC ⇒ Generation 3 LP (Private Equity, Northbrook, IL)
- 25 - Other Individual Investments
  Location: US
- 25-S Other Individual Investments Spouse (Owner: SP)
  Location: US
- 26 - CD Family Investment Partnership (Owner: SP)
  Location: US
- 27 - CDFT (Owner: SP)
  Location: US

- 27 - MSSB BROKERAGE ACCOUNT (CDFT) (Owner: SP)
  LOCATION: US
  DESCRIPTION: This account previously included assets held in an Education Trust for which neither myself, my spouse, nor any dependent children are beneficiaries. These assets have been removed.

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. Bradley S. Schneider , 08/10/2024