



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: 2023
Filing Date: 08/13/2023
Period Covered: 01/01/2022– 07/31/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Berkshire Hathaway Inc. New (BRK.B) [ST] DESCRIPTION: Berkshire Hathaway Inc Com CL B	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity Cash Account [BA] DESCRIPTION: Fidelity Government Cash Reserves	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Fidelity Cash Account [BA] DESCRIPTION: UNITED STATES TREAS SER BK-2023 0.50000% 11/30/2023 NTS NOTE	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1,001 - \$2,500
Personal residence with occasionally-rented guesthouse [RP] LOCATION: Tucson/Pima, AZ, US COMMENTS: January 1, 2023 - present: Occasional rental of guesthouse attached to primary residence owned by filer and her spouse. Note we did not rent out the guesthouse during 2022. Note also the personal residence reported here is the same as the personal residence owned by the Family Revocable Trust and also declared under this schedule.	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	None
Saleska-Engel Family Revocable Trust [RE] DESCRIPTION: Family revocable trust holding title to the personal residence of the filer and her husband in Arizona together with a summer cottage in Michigan recently purchased by the couple from the filer's parents.	JT	\$500,001 - \$1,000,000	None		

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: Fidelity Government Cash Reserves					
SEP-IRA [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Brookfield Infrastructure Partnership L.P.					
Tulane University Faculty and Administrators Retirement Plan [MF]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Contract: GRA (TIAA 35611417) (CREF 45611415); CREF Global Equities R2					
Tulane University Faculty and Administrators Retirement Plan [MF]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Contract: GRA (TIAA 35611417) (CREF 45611415); CREF Core Bond R2					
Tulane University Faculty and Administrators Retirement Plan [MF]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Contract: GRA (TIAA 35611417) (CREF 45611415); CREF Social Choice R2					
Tulane University Faculty and Administrators Retirement Plan [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Contract: RA (TIAA C3402124) (CREF U3402122); TIAA Traditional					
Tulane University Faculty and Administrators Retirement Plan [MF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Contract: GRA (TIAA 35611417) (CREF 45611415); TIAA Traditional					
Unimproved land in Michigan [RP]	JT	\$100,001 - \$250,000	None		
LOCATION: Copper Harbor, Keweenaw County, MI, US					
DESCRIPTION: Unimproved lots adjoining family cottage now owed by Filer and her husband (and held under Revocable Family Trust declared on this schedule).					
University of Arizona 403b [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Clean Edge Green Energy Index Fund (QCLN)					
University of Arizona 403b Plan [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Fidelity Government Cash Reserves					
University of Arizona 403b Plan [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Fidelity Contrafund Fund					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
University of Arizona 403b Plan [MF] DESCRIPTION: Vanguard Total Bond Market Index Fund Institutional Shares		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: JP Morgan Mid-Cap Value Fund	SP	\$15,001 - \$50,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: T. Rowe Price Retirement 2010 Fund	SP	\$50,001 - \$100,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: Fidelity Contrafund Fund	SP	\$15,001 - \$50,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: Fidelity Government Cash Reserves	SP	\$15,001 - \$50,000	Tax-Deferred		
University of Arizona 403b Plan [MF] DESCRIPTION: Vanguard Federal Money Market Fund	SP	\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: AlphaCentric Income Opportunities Fund (IOFIX)		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [EF] DESCRIPTION: iShares MSCI Global Min Vol Factor (ACWV)		\$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: Permanent Portfolio Permanent I Stock Fund		\$50,001 - \$100,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Fidelity Select Consumer Staples Portfolio (FDFAX)		\$50,001 - \$100,000	Tax-Deferred		
University of Arizona ORP [EF] DESCRIPTION: Vanguard Total Bond Market Index Fund Institutional Shares (VBTIX)		\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Fidelity Government Cash Reserves (FDRXX)		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
University of Arizona ORP [MF] DESCRIPTION: MassMutual Mid Cap Growth Fund (MEFZX)		\$250,001 - \$500,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Fidelity Select Medical Tech and Devices Portfolio	SP	\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: The Private Shares Fund Class I	SP	\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Eventide Gilead Class I	SP	\$50,001 - \$100,000	Tax-Deferred		
University of Arizona ORP [EF] DESCRIPTION: MassMutual Mid Cap Growth Fund	SP	\$100,001 - \$250,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Fidelity Government Cash Reserves	SP	\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Alger Small Cap Focus Fund	SP	\$15,001 - \$50,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: iShares Edge MSCI Min Vol USA ETE	SP	\$50,001 - \$100,000	Tax-Deferred		
University of Arizona ORP [MF] DESCRIPTION: Vanguard Total Bond Market Index Fund Institutional Shares	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo Savings Account [BA]	JT	\$15,001 - \$50,000	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	\$69,997.00	\$105,604.00
University of Arizona	Spouse's salary	N/A	N/A
Filer's SEP-IRA	Distribution	N/A	\$30,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	M&T Bank (holder of mortgage on Filer's personal residence)	November 2021	Mortgage on personal residence with attached guesthouse	\$250,001 - \$500,000
<p>COMMENTS: Filer is reporting this mortgage liability on her personal residence because filer and her husband occasionally rent out the residence's attached guesthouse. The mortgages on this same residence reported in Filer's 2022 Financial Disclosures (previously held by Wells Fargo, Fairway Independent Mortgage and Flagstar) were each paid off before being purchased by M&T Bank.</p>				

SCHEDULE E: POSITIONS

Position	Name of Organization
Faculty member	University of Arizona College of Law
Member, Legal Advisory Board	Tulane Environmental Law Clinic
<p>COMMENTS: This is a volunteer position. As of August 5, 2023, I have resigned my position on the Legal Advisory Board.</p>	
Senator	Arizona State Senate
<p>COMMENTS: I served as an Arizona State Senator representing Legislative District 10 from January 11, 2021 until September 8, 2021, the date I resigned to run for election to Congress in 2022.</p>	

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 , 08/13/2023