Filing ID #10056387

Financial Disclosure Report

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

Filer Information

Name: Lanon Baccam
Status: Congressional Candidate
State/District: IA03

Filing Information

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 12/18/2023

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AARP 401K ⇒ State Street Glb All Cap Eq ex-US Idx [MF]	SP	$1,001 - $15,000	Tax-Deferred		
AARP 401K ⇒ State Street S&P 500 Index [MF]	SP	$1,001 - $15,000	Tax-Deferred		
AARP 401K ⇒ State Street U.S. Bond Index [MF]	SP	$1,001 - $15,000	Tax-Deferred		
AARP 401K ⇒ Third Avenue Real Estate Value [MF]	SP	$1,001 - $15,000	Tax-Deferred		
AARP 401K ⇒ TRP U.S. Small-Cap Val Eq Trust D [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	$15,001 - $50,000	None		
Iowa 529 College Savings Plan [5P] Location: IA		$15,001 - $50,000	Tax-Deferred		
IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA ⇒ Global X Silver Miners ETF (SIL) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ ISHARES TIP BOND ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ SPDR Portfolio High Yield Bond ETF (SPHY) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ VanEck Gold Miners ETF (GDX) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ Vanguard FTSE All-World ex-US ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ Vanguard FTSE Emerging Markets ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ Vanguard Intermediate-Term Treasury ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ Vanguard Real Estate ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		
IRA ⇒ Vanguard Small-Cap ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		
iShares TIPS Bond ETF [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$1 - $200
ISU-Ames Laboratory Retirement Plan ⇒ TIAA-CREF Lifecycle Index 2045 Fund Institutional Class [HE]	SP	$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	$15,001 - $50,000	Tax-Deferred		
Standard Bank Deposit [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Standard Bank Deposit [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
US bank checking account [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200
US bank checking account [BA]	JT	$100,001 - $250,000	Interest	$1 - $200	$1 - $200
Vanguard FTSE All-World ex-US ETF [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Vanguard FTSE Emerging Markets ETF [EF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	$1 - $200
Vanguard Real Estate ETF [EF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
Vanguard Small-Cap Value ETF [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$1 - $200
Vanguard Tax-Exempt Bond ETF [EF]	JT	$15,001 - $50,000	Dividends	None	$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
AARP	Spouse salary	N/A	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Asset Class Details

- AARP 401K (Owner: SP)
- IRA (Owner: SP)
- ISU-Ames Laboratory Retirement Plan (Owner: SP)
- Roth IRA (Owner: SP)

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: Lanon Baccam , 12/18/2023