



Filing ID #10056985

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Thomas More Barrett
Status: Congressional Candidate
State/District: MI07

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2023
Filing Date: 04/8/2024
Period Covered: 01/01/2022– 07/7/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Credit Union Personal Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
IRA ⇒ Insured Cash Account [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Invesco Aerospace & Defense [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Invesco Aerospace & Defense [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ iShares Core MSCI Intl Dev Mkts [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ iShares Core MSCI Intl Dev Mkts [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ iShares Core S&P Small-Cap ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒		\$1,001 - \$15,000	Capital Gains,	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares Core S&P Small-Cap ETF [EF]			Dividends		
IRA ⇒ iShares Residential and Multisector Real Estate [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
IRA ⇒ iShares Residential and Multisector Real Estate [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ iShares U.S. Home Construction ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ iShares U.S. Home Construction ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ Pacer Fds Tr Us Cash Cows 100 [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ Pacer Fds Tr Us Cash Cows 100 [EF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Pacer Fds Tr Us Cash Cows 100 [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Schwab Bank Sweep [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ Vanguard FTSE Emerging Markets [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Vanguard FTSE Emerging Markets [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Vanguard Large-Cap Index Fund ETF [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ Vanguard Large-Cap Index Fund ETF [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
IRA ⇒ Vanguard Mid-Cap [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Mid-Cap [EF]					
Roth IRA ⇒ Insured Cash Account [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ Invesco Aerospace & Defense [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ iShares Core MSCI Intl Dev Mkts [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1 - \$200
Roth IRA ⇒ iShares Core MSCI Intl Dev Mkts [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ iShares Core S&P Small-Cap ETF [EF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ iShares Core S&P Small-Cap ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ iShares Residential and Multisector Real Estate [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Roth IRA ⇒ iShares U.S. Home Construction ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Roth IRA ⇒ Pacer Fds Tr Us Cash Cows 100 [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Roth IRA ⇒ Schwab Bank Sweep [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ Vanguard FTSE Emerging Markets [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ Vanguard FTSE Emerging Markets [EF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ Vanguard Large-Cap Index Fund ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒	SP	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Large-Cap Index Fund ETF [EF]					
Roth IRA ⇒ Vanguard Mid-Cap [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Roth IRA ⇒ Vanguard Mid-Cap [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Valley Strategies LLC ⇒ MSUFCU Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	None

* 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 Current Year to Filing	Amount Preceding Year
Valley Strategies, LLC	Contracted services	\$29,000.00	N/A
Aristotle International Inc.	Spouse Salary	N/A	N/A
Butzel Long, P.C.	Spouse Salary	N/A	N/A
Michigan Senate	Salary	N/A	\$78,709.00
United States Army	Wages	N/A	\$6,674.00
Ashley Barrett Law	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
President	Valley Strategies LLC
President	Valley Security Consulting LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Jimmy Greene and Associates (Saginaw, MI, US)	Research, Analysis, Strategic Advice

SCHEDULE A INVESTMENT VEHICLE DETAILS

<div><div>◦ IRA</div><div>◦ IRA (Owner: SP)</div><div>◦ Roth IRA (Owner: SP)</div><div>◦ Roth IRA</div><div>◦ Valley Strategies LLC</div><div>LOCATION: Charlotte , MI, US</div></div>
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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?

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 Yes

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 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: Thomas More Barrett , 04/8/2024