



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Shri Thanedar
Status: Member
State/District: MI13

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alphabet Inc. - Class A (GOOGL) [ST]		\$250,001 - \$500,000	None		<input type="checkbox"/>
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$250,001 - \$500,000	None		<input type="checkbox"/>
Amazon.com, Inc. (AMZN) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
American Express Company (AXP) [ST]		None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Apollo Global Management, Inc. (APO) [ST]		None	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Apple Inc. (AAPL) [ST]		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Bitcoin [OT]		\$250,001 - \$500,000	None		<input type="checkbox"/>
DESCRIPTION: Cryptocurrency					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
BNY Mellon US Large Cap Core Equity ETF (BKLC) [EF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Cash - Investment Accounts [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Commercial Property in Detroit, MI (The Shri Thanedar Community Center) [RP]		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Detroit, MI, US					
DFA Emerging Markets Value Portfolio Institutional Class (DFEVX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DFA Global Allocation 60/40 Portfolio Institutional Class [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
DFA Intermediate-Term Municipal Bond Portfolio Institutional Class [MF]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
DFA International Core Equity Portfolio Institutional Class (DFIEX) [MF]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
DFA International Small Cap Value Portfolio Institutional Class [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DFA US Core Equity 1 Portfolio Institutional Class [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DFA US Core Equity II Portfolio Institutional Class [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
DFA US Large Cap Value Portfolio Institutional Class (DFLVX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DFA US Large Company Portfolio Institutional Class [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DFA US Small Cap Value Portfolio Institutional Class [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Dimensional 2050 Target Date Retirement Income Fund Institutional Class (DRIJX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Dimensional US Core Equity 2 ETF (DFAC) [EF]		\$500,001 -	Dividends	\$5,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$1,000,000		\$15,000	<input type="checkbox"/>
Dimensional World ex US Core Equity 2 ETF (DFAX) [EF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Ethereum [OT]		\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Cryptocurrency					
iShares Core S&P Total US Stock Market ETF [EF]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
iShares Gold Trust [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
iShares MSCI EAFE Value ETF (EFV) [EF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
iShares TIPS Bond ETF [EF]		None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JPMorgan U.S. Government Money Market Fund Premier (OGSXX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
JPMorgan US Treasury Plus Money Market Fund-Premier [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Litecoin [OT]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Cryptocurrency					
Microsoft Corporation (MSFT) [ST]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Missouri 529 Plan/Age Based [5P]		\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: MO					
DESCRIPTION: 529 age based plan					
Rental Property in Ann Arbor, MI [RE]		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
Rental Property in Oxford, NJ [RE]		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
Vanguard Information Technology Index Fund ETF [EF]		\$100,001 -	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$250,000			<input type="checkbox"/>
Vanguard 500 Index Fund Admiral Shares (VFIAX) [MF]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard 500 Index Fund ETF (VOO) [EF]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Balanced Index Fund Admiral Shares [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Vanguard Commodity Strategy Fund Admiral Shares [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Energy Index Fund ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Inflation-Protected Securities Fund Admiral Shares [MF]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard LifeStrategy Growth Fund Investor Shares [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
Vanguard LifeStrategy Moderate Growth Fund Investor Shares [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Real Estate Index Fund Admiral Shares (VGSLX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Small Cap Value Index Fund Admiral Shares (VSIAX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Small Cap Value Index Fund ETF (VBR) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Total Bond Market Index Fund Admiral Shares [MF]		None	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Total International Stock Index Fund Admiral Shares (VTIAX) [MF]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Total Stock Market Index Fund Admiral Shares (VTSAX) [MF]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Total Stock Market Index Fund ETF [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Vanguard Total World Stock Index Fund Admiral Shares (VTWAX) [MF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Total World Stock Index Fund ETF [EF]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Value Index Fund ETF (VTV) [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Walmart Inc. (WMT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

* 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?
American Express Company (AXP) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
American Express Company (AXP) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
American Express Company (AXP) [ST]		01/23/2023	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Apollo Global Management, Inc. (APO) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Apollo Global Management, Inc. (APO) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Apollo Global Management, Inc. (APO) [ST]		01/23/2023	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Biogen Inc. (BIIB) [ST]		01/23/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Blackstone Inc. (BX) [ST]		01/23/2023	S	\$50,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
				\$100,000	—
Coherus BioSciences, Inc. (CHRS) [ST]		01/23/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Commercial Property in Detroit, MI (The Shri Thanedar Community Center) [RP] LOCATION: Detroit, MI, US		03/9/2023	P	\$250,001 - \$500,000	
COMPASS Pathways Plc - American Depository Shares (CMPS) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
KKR & Co. Inc. (KKR) [ST]		01/23/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Starbucks Corporation (SBUX) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Starbucks Corporation (SBUX) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Starbucks Corporation (SBUX) [ST]		01/23/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Tesla, Inc. (TSLA) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Tesla, Inc. (TSLA) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
The Carlyle Group Inc. (CG) [ST]		01/23/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
The Carlyle Group Inc. (CG) [ST]		01/23/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
The Carlyle Group Inc. (CG) [ST]		01/23/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Walmart Inc. (WMT) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Walmart Inc. (WMT) [ST]		01/23/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

* 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
US Congressman	Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	UBS Credit Card	On Going balance in the account	Credit Card Purchases	\$15,001 - \$50,000
	TriState Capital Bank	December 2021 - Present	Line of Credit Against Investment Account	\$1,000,001 - \$5,000,000
	LPL Financial	April 2022 - Present	Margin on Investment Account	\$5,000,001 - \$25,000,000
	Old National Bank	2018	Rental property in Ann Arbor	\$1,000,001 - \$5,000,000
	Capital One Credit Card	On Going balance in the account	Credit Card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Shri Thanedar Living Trust
Trustee	Thanedar Neil Irrev Trust
Trustee	Thanedar Samir Irrev Trust
Congressman	U.S. Congress

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
2021	Congressman Thanedar and State of Michigan	Retirement plan to be paid out upon eligibility. No longer contributing.

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	08/5/2023	08/13/2023	Detroit - Israel - Tel Aviv	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Indian Government MECEA	08/13/2023	08/28/2023	Tel Aviv - Delhi - Detroit	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Shri Thanedar , 08/13/2024