



Filing ID #10057450

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. John Curtis
Status: Member
State/District: UT03

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/5/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Action Opportunity Fund [RP] LOCATION: Provo, UT, US		\$5,000,001 - \$25,000,000	None		<input type="checkbox"/>
AmBank Checking Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Ameritrade ⇒ Invesco QQQ Trust [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameritrade ⇒ iShares Core S&P 500 ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameritrade ⇒ ProShares UltraPro Dow30 [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameritrade ⇒ SPDR Dow Jones Industrial Average ETF Trust [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameritrade ⇒ Zoom Video Communications, Inc. - Class A (ZM) [ST]		\$15,001 - \$50,000	None		<input type="checkbox"/>
ATI Founders, Inc. (shooting range equipment) - [OL]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Provo, UT, US DESCRIPTION: Shooting range equipment					
Bear Lake Rental (Garden City, UT) [RP]		\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Garden City, UT, US					
Curtis Family Georgetown Condo, LLC, (Provo, UT) [RP]		None	Capital Gains	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
LOCATION: Provo, UT, US					
Curtis Family Trust ⇒ Parcel #16-044-0006 [RP]		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Weber County, UT, US					
Curtis Family Trust ⇒ Vacant Lot [RP]		\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Brighton, UT, US					
Curtis Family Trust ⇒ Zions Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Curtis Family Trust ⇒ Zions Bank Money Market Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Domo, Inc. - Class B (DOMO) [ST]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Influence Int'l Inc. - business relationship development services - Provo, UT [PS] DESCRIPTION: Business relationship development services		\$15,001 - \$50,000	None		<input type="checkbox"/>
John Reem Curtis, SPE, LLC (North Ogden, UT) [RP]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: North Ogden, UT, US					
Monticello Development Company, LLC - unimproved land [RP]		\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: Monticello, UT, US					
North Ogden Residential Property [RP]		\$500,001 - \$1,000,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: North Ogden, UT, US					
Northwestern Mutual ⇒		\$50,001 -	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AGG - iShares Core US Aggregate Bond [HE]		\$100,000			<input type="checkbox"/>
Northwestern Mutual ⇒ Cohen & Steers Real Estate Securities Fund Class I [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual ⇒ DODIX - DODGE & COX INCOME FUND [MF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Northwestern Mutual ⇒ FVADX - FRANKLIN SMALL-CAP VALUE FUND ADVISOR CLAS [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual ⇒ IEF - iShares TR 7-10 Yr Treas Bd [EF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Northwestern Mutual ⇒ IEFA - iShares Core MSCI EAFE [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ IEMG - iShares Core MSCI Emerging Markets [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Northwestern Mutual ⇒ IJR - iShares Core S&P Small-Cap [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual ⇒ iShares Inc. MSCI Eurozone ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual ⇒ IVV - iShares Core S&P 500 [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Northwestern Mutual ⇒ MDY - SPDR S&P MIDCAP 400 [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual ⇒ PCLPX - PIMCO COMMODITIES PLUS STRATEGY FUND CLASS I-2 [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual ⇒ PIFZX - PGIM Short-Term Corporate Bond Fund Class Z [HE]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual ⇒ VBTLX - VANGUARD TOTAL BD MKT IDX FUND [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual ⇒ VNQ - Vanguard Real Estate Index Fund [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual ⇒ VO - Vanguard Mid-Cap Index Fund [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Abbott Laboratories (ABT) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Adobe Inc. (ADBE) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ CALIFORNIA ST GO VAR PURP REF BDS 4.000% 03/01/37 B/E DTD [CS] DESCRIPTION: California	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ CALIFORNIA ST UNIV REV BDS 2018 A 5.000% 11/01/35 B/E [CS] DESCRIPTION: California	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Chevron Corporation (CVX) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ COLO-NESCO CMNTY SCHDIST IOWA GO BDS 2020 3.000% 06/01/31 [CS] DESCRIPTION: Colo-Nesco Community School District, Iowa	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ COLORADO ST CTFS PARTN RURAL COPS 2020 A 4.000% 12/15/37 [CS] DESCRIPTION: Colorado	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ ConocoPhillips (COP) [ST]	JT	None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ EASTERN HOWARD IND THIRD MILLENNIUM SCH BLDG CORP AD VALOREM PPTY TAX FIRST MTG 4.000% 07/15/33 [CS] DESCRIPTION: Howard County, IN	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ FVADX - FRANKLIN SMALL-CAP VALUE FUND ADVISOR CLAS [MF]	JT	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ General Municipal Mny Mkt Cl A [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ GEORGIA ST GO BDS 2021 A 4.000% 07/01/34 [CS] DESCRIPTION: Georgia	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Goldman Sachs International Small Cap Insights Fund (GICIX) [MF]	JT	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ HENDERSON COUNTY NC LTD OBLIG BDS 2020 4.000% 06/01/34 B/E DTD [CS] DESCRIPTION: Henderson County, NC	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ HENNEPIN CNTY MINN GO SALES TAX REV BDS 2019 B 5.000% 12/15/39 B/E [CS] DESCRIPTION: Hennepin County, MN	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Home Depot, Inc. (HD) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ IEFA - iShares Core MSCI EAFE [EF]	JT	\$250,001 - \$500,000	Capital Gains	\$5,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IEMG - iShares Core MSCI Emerging Markets [EF]	JT	\$50,001 - \$100,000	Capital Gains	\$2,501 - \$5,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IJR - iShares Core S&P Small-Cap [EF]	JT	\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ INDIANA ST FIN AUTH WASTEWATER UTIL REV FIRST LIEN REF BDS CWA AUTHORITY INC 4.000% 10/01/36 [CS] DESCRIPTION: Indiana	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ JACKSON MICH LTD TAX GO CAP IMPT BDS 2018 5.000%	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
06/01/31 B/E DTD [CS]					
DESCRIPTION: Jackson, MI					
Northwestern Mutual - Joint ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ MDY - SPDR S&P MIDCAP 400 [EF]	JT	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Microsoft Corporation (MSFT) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ MISSISSIPPI ST GO BDS 2019 B 4.000% 10/01/36 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Mississippi					
Northwestern Mutual - Joint ⇒ OAK CREEK WIS NT ANTIC NTS 2023 B 4.000% 04/01/26 [CS]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Oak Creek, WI					
Northwestern Mutual - Joint ⇒ OLATHE KANS GO IMPT REF BDS 234 3.000% 10/01/32 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Olathe, KS					
Northwestern Mutual - Joint ⇒ ONSLow CNTY N C LTD OBLIG LTD OBLIG BDS 2016 4.000% 10/01/35 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Onslow County, NC					
Northwestern Mutual - Joint ⇒ OSAGE CNTY KANS GO REF AND IMPT BDS 2021 A 3.000% 09/01/30 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Osage County, KS					
Northwestern Mutual - Joint ⇒ OSHKOSH WIS AREA SCH DIST GO PROM NTS 2022 2.625% 03/01/27 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Oshkosh, WI					
Northwestern Mutual - Joint ⇒ PCLPX - PIMCO COMMODITIES PLUS STRATEGY FUND CLASS I-2 [MF]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
PENN IND HIGH SCH BLDG CORP AD VALOREM PPTY TAX FIRST MTG BDS 2021 4.000% 07/15/34 [CS] DESCRIPTION: St. Joseph County, IN					
Northwestern Mutual - Joint ⇒ PIFZX - PGIM Short-Term Corporate Bond Fund Class Z [MF]	JT	\$50,001 - \$100,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PRINCE GEORGES CNTY MD GO CONS PUB IMPT BDS 2014A 4.000% 09/01/32 B/E DTD 09/30/14 CLB CLB 09/01/24 [CS] DESCRIPTION: Prince George's County, MD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Procter & Gamble Company (PG) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ ROMEOVILLE ILL GO BDS 2019 4.000% 12/30/38 [CS] DESCRIPTION: Romeoville, IL	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SANGAMON LOGAN & MENARD CNTYS ILL CMNTY [CS] DESCRIPTION: Sangamon, Logan, & Menard County, IL	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SARATOGA SPRINGS UTAH WTR REV REF BDS 2014 3.000% 12/01/24 B/E DTD [CS] DESCRIPTION: Saratoga Springs, UT	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Schwab U.S. REIT ETF (SCHH) [EF]	JT	\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ SKAGIT CNTY WASH CONS SCH DIST NO 320 [CS] DESCRIPTION: Skagit County, WA	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SOUTH CAROLINA TRANSN INFRASTRUCTURE BK REV REF BDS 2021 A 4.000% 10/01/33 [CS] DESCRIPTION: South Carolina	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Starbucks Corporation (SBUX) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SULLIVAN CNTY PA SCH DIST GO NTS 2020 3.000% 04/01/28 B/E DTD 07/07/20 [CS] DESCRIPTION: Sullivan County, PA					
Northwestern Mutual - Joint ⇒ Texas Instruments Incorporated (TXN) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ TEXAS ST GO MOBILITY FD BDS A 4.000% 10/01/34 [CS] DESCRIPTION: Texas	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ TEXAS WATER DEV BRD ST REVOLVING FD REV BDS 2020 4.000% 08/01/34 [CS] DESCRIPTION: Texas	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ TOLEDO OHIO WTRWKS REV SYS BDS 2020 5.000% 11/15/33 [CS] DESCRIPTION: Toledo, OH	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ UNION CNTY N C LTD OBLIG REF BDS 2023 5.000% 12/01/25 [CS] DESCRIPTION: Union County, NC	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ UTAH COUNTY UTAH TRANSN SALES TAX REV REF BDS 2021 4.000% 12/01/38 [CS] DESCRIPTION: Utah County, UT	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Vanguard Total Bond Market ETF (BND) [EF]	JT	\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ VAW - Vanguard Materials Index Fund [EF]	JT	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VNQ - Vanguard Real Estate Index Fund [HE]	JT	\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VO - Vanguard Mid-Cap Index Fund [EF]	JT	\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VPU - Vanguard Utilities Index Fund [EF]	JT	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ WINNEBAGO CNTY WIS GO PROM NTS 5.000% 04/01/24 [CS] DESCRIPTION: Winnebago County, WI	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Zoetis Inc. Class A (ZTS) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Northwestern Mutual - SC ⇒ Cohen & Steers Real Estate Securities Fund Class I [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ DODIX - DODGE & COX INCOME FUND [HE]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ FVADX - FRANKLIN SMALL-CAP VALUE FUND ADVISOR CLAS [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IEFA - iShares Core MSCI EAFE [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IEMG - iShares Core MSCI Emerging Markets [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IJR - iShares Core S&P Small-Cap [HE]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Northwestern Mutual - SC ⇒ iShares Inc. MSCI Eurozone ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IVV - iShares Core S&P 500 [HE]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ MDY - SPDR S&P MIDCAP 400 [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ PCLPX - PIMCO COMMODITIES PLUS STRATEGY FUND CLASS I-2 [HE]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒	SP	\$1 - \$1,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
PIFZX - PGIM Short-Term Corporate Bond Fund Class Z [HE]					
Northwestern Mutual - SC ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Northwestern Mutual - SC ⇒ SPDR MidCap Trust Series I (MDY) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VBTIX - VANGUARD TOTAL BD MKT IDX FUND [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VNIQ - Vanguard Real Estate Index Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VO - Vanguard Mid-Cap Index Fund [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Peak Ventures Fund II, L.P. [HE]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Peg Opportunity Zone [OL] LOCATION: Provo, UT, US DESCRIPTION: Real Estate Investment Firm		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Provo Rental (Provo, UT) [RP] LOCATION: Provo, UT, US		\$1,000,001 - \$5,000,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
QQ Corpus Christi [OL] LOCATION: Corpus Christi, TX, US DESCRIPTION: Car wash		\$100,001 - \$250,000	Distributions	\$15,001 - \$50,000	<input type="checkbox"/>
QQRGV [OL] LOCATION: Rio Grande Valley, TX, US DESCRIPTION: Car wash		\$100,001 - \$250,000	None		<input type="checkbox"/>
QQUV Investments 2, LLC (Quick Quack Car Wash) [OL] LOCATION: Pleasant Grove & Orem, UT, US DESCRIPTION: Car wash		\$50,001 - \$100,000	Distributions	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
QQUV Investments 3, LLC (Quick Quack Car Wash) [OL] LOCATION: Springville & Spanish Fork, UT, US DESCRIPTION: Car wash		\$15,001 - \$50,000	Distributions	\$5,001 - \$15,000	<input type="checkbox"/>
QQUV Investments 4, LLC (Quick Quack Car Wash) [OL] LOCATION: Utah County, UT, US DESCRIPTION: Car wash		\$50,001 - \$100,000	None		<input type="checkbox"/>
QQUV Investments, LLC (Quick Quack Car Wash) [OL] LOCATION: Highland & American Fork, UT, US DESCRIPTION: Car wash		\$15,001 - \$50,000	Distributions	\$15,001 - \$50,000	<input type="checkbox"/>
Sundance Debt Partners, LLC [OL] LOCATION: Salt Lake City, UT, US DESCRIPTION: Real estate firm		\$1,000,001 - \$5,000,000	Interest	\$100,001 - \$1,000,000	<input type="checkbox"/>
TriState Capital Holdings, Inc. (TSC) [OT] DESCRIPTION: Stock Account Collateral		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Wells Fargo Interest Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Money Market Savings Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Zions Bank Checking Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Zions Bank Checking Plus Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Zions Bank Money Market [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>

* 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?
Curtis Family Georgetown Condo, LLC [RP] LOCATION: Provo, UT, US		02/15/2023	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
Matthews Pacific Tiger Fund Insti Class (MIPTX) [MF]		09/19/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF]		05/8/2023	P	\$15,001 - \$50,000	
Northwestern Mutual ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]		09/23/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		09/25/2023	P	\$15,001 - \$50,000	
Northwestern Mutual - Joint ⇒ Abbott Laboratories (ABT) [ST]	JT	09/13/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Abbott Laboratories (ABT) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Adobe Inc. (ADBE) [ST]	JT	09/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Adobe Inc. (ADBE) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	JT	06/21/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	JT	12/4/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Amazon.com, Inc. (AMZN) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ Amazon.com, Inc. (AMZN) [ST]	JT	12/4/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ American Express Company (AXP) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Apple Inc. (AAPL) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Apple Inc. (AAPL) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Applied Materials, Inc. (AMAT) [ST]	JT	06/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Applied Materials, Inc. (AMAT) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ AutoZone, Inc. (AZO) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Bank of America Corporation (BAC) [ST]	JT	03/16/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	03/16/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	04/26/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ BlackRock, Inc. (BLK) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Boston Scientific Corporation (BSX) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Boston Scientific Corporation (BSX) [ST]	JT	04/26/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Boston Scientific Corporation (BSX) [ST]					<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Caterpillar, Inc. (CAT) [ST]	JT	04/26/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Caterpillar, Inc. (CAT) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Chevron Corporation (CVX) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Chevron Corporation (CVX) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Chipotle Mexican Grill, Inc. (CMG) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Coca-Cola Company (KO) [ST]	JT	06/21/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Coca-Cola Company (KO) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Comcast Corporation - Class A (CMCSA) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ ConocoPhillips (COP) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Constellation Brands, Inc. (STZ) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Costco Wholesale Corporation (COST) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Costco Wholesale Corporation (COST) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ CSX Corporation (CSX) [ST]	JT	04/26/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ CSX Corporation (CSX) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ Danaher Corporation (DHR) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Deere & Company (DE) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Edwards Lifesciences Corporation (EW) [ST]	JT	04/26/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Edwards Lifesciences Corporation (EW) [ST]	JT	06/21/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Edwards Lifesciences Corporation (EW) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Elevance Health, Inc. (ELV) [ST]	JT	04/26/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Elevance Health, Inc. (ELV) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Eli Lilly and Company (LLY) [ST]	JT	09/13/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Eli Lilly and Company (LLY) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Emerson Electric Company (EMR) [ST]	JT	09/13/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Emerson Electric Company (EMR) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ FIRST REPUBLIC BANK (FRC) [ST]	JT	03/16/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Fiserv, Inc. (FI) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Goldman Sachs Group, Inc. (GS) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ Hilton Worldwide Holdings Inc. (HLT) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Home Depot, Inc. (HD) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Honeywell International Inc. (HON) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Intercontinental Exchange Inc. (ICE) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]	JT	09/23/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Johnson & Johnson (JNJ) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Johnson & Johnson (JNJ) [ST]	JT	09/13/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ KLA Corporation (KLAC) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Lam Research Corporation (LRCX) [ST]	JT	06/21/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Lam Research Corporation (LRCX) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Mastercard Incorporated (MA) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Mastercard Incorporated (MA) [ST]	JT	04/26/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ Mastercard Incorporated (MA) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Meta Platforms, Inc. - Class A (META) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Meta Platforms, Inc. - Class A (META) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Microsoft Corporation (MSFT) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Microsoft Corporation (MSFT) [ST]	JT	05/11/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Microsoft Corporation (MSFT) [ST]	JT	06/21/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Microsoft Corporation (MSFT) [ST]	JT	12/4/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Nike, Inc. (NKE) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ NVIDIA Corporation (NVDA) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ NVIDIA Corporation (NVDA) [ST]	JT	04/26/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ NVIDIA Corporation (NVDA) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ OAK CREEK WIS NT ANTIC NTS 2023 B 4.000% 04/01/26 [CS] DESCRIPTION: Oak Creek, WI	JT	03/14/2023	P	\$15,001 - \$50,000	
Northwestern Mutual - Joint ⇒ OSHKOSH WIS AREA SCH DIST GO PROM NTS 2022 2.625% 03/01/27 [CS] DESCRIPTION: Oshkosh, WI	JT	01/27/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒	JT	09/13/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Palo Alto Networks, Inc. (PANW) [ST]					
Northwestern Mutual - Joint ⇒ Palo Alto Networks, Inc. (PANW) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Pepsico, Inc. (PEP) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Procter & Gamble Company (PG) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Procter & Gamble Company (PG) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Raytheon Technologies Corporation (RTX) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ RTX Corporation (RTX) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ S&P Global Inc. (SPGI) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Salesforce, Inc. (CRM) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Sherwin-Williams Company (SHW) [ST]	JT	06/21/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Sherwin-Williams Company (SHW) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Starbucks Corporation (SBUX) [ST]	JT	04/26/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Starbucks Corporation (SBUX) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Sysco Corporation (SYF) [ST]	JT	06/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Texas Instruments Incorporated (TXN) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ TEXAS ST GO MOBILITY FD BDS A 4.000% 10/01/34 [CS] DESCRIPTION: Texas State	JT	09/22/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ T-Mobile US, Inc. (TMUS) [ST]	JT	06/21/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ T-Mobile US, Inc. (TMUS) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ UNION CNTY N C LTD OBLIG REF BDS 2023 5.000% 12/01/25 [CS] DESCRIPTION: Union County, NC	JT	04/27/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Union Pacific Corporation (UNP) [ST]	JT	09/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Union Pacific Corporation (UNP) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	02/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	06/21/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Valero Energy Corporation (VLO) [ST]	JT	06/21/2023	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Valero Energy Corporation (VLO) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ Visa Inc. (V) [ST]	JT	04/26/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Visa Inc. (V) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Waste Management, Inc. (WM) [ST]	JT	09/13/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ WINNEBAGO CNTY WIS GO PROM NTS 5.000% 04/01/24 [CS] DESCRIPTION: Winnebago County, Wisconsin	JT	11/9/2023	P	\$15,001 - \$50,000	
Northwestern Mutual - Joint ⇒ Zoetis Inc. Class A (ZTS) [ST]	JT	12/4/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Northwestern Mutual - SC ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]	SP	09/23/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]	SP	12/21/2023	P	\$1,001 - \$15,000	
Schwab U.S. REIT ETF (SCHH) [EF]		10/11/2023	P	\$50,001 - \$100,000	
Vanguard Total Bond Market ETF (BND) [EF]		10/11/2023	P	\$100,001 - \$250,000	

* 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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of Utah	June 2018	Mortgage	\$1,000,001 - \$5,000,000
	EverBank	March 2023	Mortgage on Residential Rental Property	\$1,000,001 -

\$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Manager	Curtis Family Georgetown Condo, LLC
Manager	Curtis Family Brighton, LLC
Manager	John Ream Curtis 800 S. Center SPE, LLC
Manager	Action Opportunity Fund
Member	Monticello Development Company, Inc
Limited partner	Peak Ventures Fund II, L.P.
Limited partner	Monticello Development Company, LLC
Limited partner	QQUV Investments
Trustee	Curtis Family Trust
Board of Advisors	America's Freedom Festival

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?
The Aspen Institute, Inc. (Congressional Program)	02/19/2023	02/25/2023	Salt Lake City, UT - Cartagena, Columbia - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The Aspen Institute, Inc. and City of Miami	03/6/2023	03/7/2023	Salt Lake City, UT - Miami, FL - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Aspen Institute, Inc. (Congressional Program)	08/12/2023	08/19/2023	Salt Lake City, UT - Nairobi, Kenya - Salt Lake City, UT	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Ameritrade
LOCATION: US
- Curtis Family Trust
- Northwestern Mutual
- Northwestern Mutual - Joint (Owner: JT)
- Northwestern Mutual - SC (Owner: SP)

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. John Curtis , 08/5/2024