



Filing ID #10058821

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Zach Nunn
Status: Member
State/District: IA03

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?
ALABAMA RENTAL PROPERTY [RP] LOCATION: MONTGOMERY, AL, US		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Certificates of Deposit [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ CHARLES SCHWAB SWEEP ACCOUNT [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab IRA ⇒ Sweep Account [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [1] ⇒ 529 IA IAdvisor 529 Age 11-15 Option Class A (VWACX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [1] ⇒ IADVISOR 529 GROWTH A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [2] ⇒ 529 IA IAdvisor 529 Age 11-15 Option Class A (VWACX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Child savings account [2] ⇒ IADVISOR 529 GROWTH A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [3] ⇒ IADVISOR 529 AGE 11-15 A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [3] ⇒ IADVISOR 529 GROWTH A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [4] ⇒ IADVISOR 529 GROWTH A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [5] ⇒ 529 IA IAdvisor 529 Age 11-15 Option Class A (VWACX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [5] ⇒ 529 IA IAdvisor 529 Growth (VWARX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [6] ⇒ 529 IA IAdvisor 529 Age 11-15 Option Class A (VWACX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [6] ⇒ 529 IA IAdvisor 529 Growth (VWARX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [7] ⇒ 529 IA IAdvisor 529 Growth (VWARX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Child savings account [8] ⇒ 529 IA IAdvisor 529 Growth (VWARX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IOWA RENTAL PROPERTY [RP] LOCATION: BONDURANT, IA, US		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
NUNN ROTH IRA [2] ⇒ FRANKLIN DYNATECH CL R6 [FDTRX] [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
NUNN ROTH IRA [2] ⇒ HARTFORD BALANCED INCOME CL F [HBLFX] [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
NUNN ROTH IRA [2] ⇒ LORD ABBETT SHORT DURATION INCOME CL F3		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[LOLDX] [MF]					
NUNN ROTH IRA [2] ⇒ PGIM TOTAL RETURN BOND CL R6 [PTRQX] [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
NUNN ROTH IRA [2] ⇒ T ROWE PRICE GLOBAL STOCK CL I [TRGLX] [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
NUNN ROTH IRA [2] ⇒ T ROWE PRICE LARGE-CAP GROWTH CL I [TRLGX] [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
NUNN ROTH IRA [2] ⇒ T ROWE PRICE U.S. TREASURY MONEY CL I [TRGXX] [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
NUNN ROTH IRA [2] ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
NUNN ROTH IRA [2] ⇒ VICTORY INTEGRITY SMALL MID CAP VALUE CL R6 [MIRSX] [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ Franlin DynaTech Fund Cl R6 (FDTRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ Integrity Small/Mid Cap Value Fund Class R6 (MIRSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ JPMorgan Growth Advantage Fund R6 (JGVVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ SPDR S&P Dividend ETF (SDY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ T. Rowe Price Large-Cap Growth Fund Class I (TRLGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ The Hartford Balanced Income Fund Class F (HBLFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
The Hartford Dividend & Growth Fund Class F (HDGFX) [MF]					
Spouse IRA => Vanguard Total International Bond ETF (BNDX) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
STATE OF IOWA PENSION PLAN [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
USAA CHECKING ACCOUNT [1] [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
USAA CHECKING ACCOUNT [2] [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
USAA FEDERAL SAVINGS ACCOUNT [BA]		\$1,001 - \$15,000	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

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
NUNN ENTERPRISES (SPOUSE)	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	DOVENMUEHLE MORTGAGE, INC., SERVICER FOR CROSSCOUNTRY MORTGAGE, LLC	MAY 2021	MORTGAGE	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
CHAIR; CO-PRESIDENT	TASK FORCE ARGO, LLC
COMMENTS: VOLUNTEER BOARD AND OFFICE HOLDER.	
CO-OWNER; VICE PRESIDENT	NUNN ENTERPRISES

Position	Name of Organization
COMMENTS: POSITION HELD PRIOR TO EMPLOYMENT AT HOUSE OF REPRESENTATIVES.	
SQUADRON COMMANDER; DEP. GROUP COMMANDER	IOWA AIR NATIONAL GUARD
COMMENTS: POSITION HELD PRIOR TO EMPLOYMENT AT HOUSE OF REPRESENTATIVES.	

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Charles Schwab IRAChild savings account [1] LOCATION: IAChild savings account [2] LOCATION: IAChild savings account [3] LOCATION: IAChild savings account [4] LOCATION: IAChild savings account [5] LOCATION: IAChild savings account [6] LOCATION: IAChild savings account [7] LOCATION: IAChild savings account [8] LOCATION: IANUNN ROTH IRA [2]Spouse IRA (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. Zach Nunn , 08/13/2024