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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Nikki Budzinski
Status: Member
State/District: IL13

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/8/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Individual Single Account ⇒ American Balanced A (ABALX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Individual Single Account ⇒ AMERICAN CAP WRLD GRW & INC A (CWGIX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Individual Single Account ⇒ AMERICAN FUNDAMENTAL INV A (ANCFX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Individual Single Account ⇒ AMERICAN GROWTH FD OF AMER A (AGTHX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Individual Single Account ⇒ AMERICAN NEW ECONOMY A (ANEFX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Individual Single Account ⇒ AMERICAN NEW PERSPECTIVE A (ANWPX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Individual Single Account ⇒ AMERICAN WASH MUTUAL INV A (AWSHX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Individual Single Account ⇒ Cash [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Individual Single Account ⇒ JH FNDM LARGE CAP CORE A (TAGRX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Individual Single Account ⇒ JPMORGAN EQUITY INCOME A (OIEIX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Individual Single Account ⇒ JPMORGAN LARGE CAP GROWTH A (OLGAX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Individual Single Account ⇒ JPMORGAN MID CAP EQUITY A (JCMAX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Individual Single Account ⇒ JPMORGAN SMALL CAP BLEND A (VSCOX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Individual Single Account ⇒ LAKE CNTY IL SCH DIST GO (LAKECOSCH33Z34) [GS] DESCRIPTION: Maturity date 12/1/2034		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan Chase Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Roth IRA-1 ⇒ AMERICAN AMCAP A (AMCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA-1 ⇒ AMERICAN CAP WRLD GRW & INC A (CWGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA-1 ⇒ AMERICAN FUNDAMENTAL INV A (ANCFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA-1 ⇒ American Funds Investment Company of America Class A (AIVSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA-1 ⇒ American Funds SMALLCAP World Fund Class C (SWCWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA-1 ⇒ HARTFORD CAP APPRECIATION A (ITHAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA-1 ⇒ INVESCO COMSTOCK A (ACSTX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Roth IRA-1 ⇒ Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
State Employees' Retirement System of Illinois [DB]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ AMERICAN AMCAP A (AMCPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ AMERICAN CAP WRLD GRW & INC A (CWGIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ AMERICAN FUNDAMENTAL INV A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Traditional IRA-1 ⇒ AMERICAN HIGH-INCOME TRUST A (AHITX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ AMERICAN INC FUND OF AMER A (AMECX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ AMERICAN INVEST CO OF AMER A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Traditional IRA-1 ⇒ AMERICAN NEW ECONOMY A (ANEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ AMERICAN NEW PERSPECTIVE A (ANWPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ AMERICAN WASH MUTUAL INV A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Traditional IRA-1 ⇒ JPMORGAN LARGE CAP GROWTH A (OLGAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ JPMORGAN MID CAP EQUITY A (JCMAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ JPMORGAN MID CAP GROWTH A (OSGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-1 ⇒ JPMORGAN MID CAP VALUE A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Traditional IRA-1 ⇒ JPMorgan U.S. Value Fund Class A (VGRIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-2 ⇒ AMERICAN AMCAP A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-2 ⇒ AMERICAN BALANCED A (ABALX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-2 ⇒ American Funds The Bond Fund of America Class A (ABNDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-2 ⇒ AMERICAN HIGH-INCOME TRUST A (AHITX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-2 ⇒ AMERICAN INVEST CO OF AMER A (AIVSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-2 ⇒ AMERICAN NEW ECONOMY A (ANEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-2 ⇒ AMERICAN SMALLCAP WORLD A (SMCWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-2 ⇒ AMERICAN WASH MUTUAL INV A (AWSHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Traditional IRA-2 ⇒ JPMORGAN MID CAP EQUITY A (JCMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
United Food and Commercial Worker International Union Pension Plan [DB]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Bank Accounts [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?
Roth IRA-1 ⇒ Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]		12/18/2023	P	\$1,001 - \$15,000	
Roth IRA-1 ⇒ Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]		04/14/2023	P	\$1,001 - \$15,000	
Traditional IRA-1 ⇒ American Funds Investment Co of America A (AIVSX) [MF]		12/14/2023	P	\$1,001 - \$15,000	
Traditional IRA-1 ⇒ Fundamental Investors, Class A Shares (ANCFX) [MF]		12/18/2023	P	\$1,001 - \$15,000	
Traditional IRA-1 ⇒ JP Morgan Mid Cap Value Fund-A Share Class (JAMCX) [MF]		12/14/2023	P	\$1,001 - \$15,000	
Traditional IRA-1 ⇒ Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]		12/18/2023	P	\$1,001 - \$15,000	

* 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
	Middletown State Bank	October 2021	Mortgage on personal residence	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2008	United Food and Commercial Worker International Union Pension Plan for Employees	Employee Pension Plan
March 2000	State Employees' Retirement System of Illinois	Employee Pension System

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

- Individual Single Account
- Roth IRA-1
- Traditional IRA-1
- Traditional IRA-2

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

COMMENTS

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. Nikki Budzinski , 05/8/2024