



Filing ID #10059701

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Michael K. Simpson
Status: Member
State/District: ID02

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/4/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Estate & Trust (Accuplan) ⇒ Precious Metals [OT] DESCRIPTION: Precious Metals IRA	SP	\$100,001 - \$250,000	Precious Metals	None	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ D.A. Davidson [OT] DESCRIPTION: IRA Account		\$500,001 - \$1,000,000	Capital Gains, Dividends, Interest	\$50,001 - \$100,000	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ First Trust Cons. Staples AlphaDEX (FXG) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ First Trust DJ Internet Index Fund (FDN) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ First Trust Energy AlphaDEX Fund (FXN) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ First Trust Large Cap Value AlphaDEX Fund (FTA) [ST] DESCRIPTION: Sold position.		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ First Trust MLP and Energy Income Fund Common Shares		\$15,001 - \$50,000	Capital Gains, Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
of Beneficial Interest (FEI) [ST]					
D.A. Davidson/Stifel ⇒ First Trust NASDAQ Rising Dividend Achievers ETF (RDVY) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ First Trust NASDAQ-100 Ex-Technology Sector Index Fund (QQXT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ First Trust VL Dividend (FVD) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ Global X Robotics & Artificial Intelligence ETF (BOTZ) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ PowerShares International BuyBack Achievers Portfolio (IPKW) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
D.A. Davidson/Stifel ⇒ T. Rowe Price Group, Inc. (TROW) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: prhsx would not load in the system, THIS IS THE CORRECT FUND: T Rowe Health Sciences (PRHSX)					
D.A. Davidson/Stifel ⇒ T. Rowe Price Group, Inc. (TROW) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: prwcx would not load in the system, THIS IS THE CORRECT FUND: T Rowe Price Cap Apprec, sym: PRWCX					
D.A. Davidson/Stifel ⇒ T. Rowe Price Group, Inc. (TROW) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PRDMX would not load in the system. THIS IS THE CORRECT FUND: T Rowe Price Diversified Mid Cap Growth Sym: PRDMX					
Farm Ground ⇒ Farm Ground [OT]	SP	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Lease Payment. Property Address: 300 N. Tressel Road Blackfoot, Idaho 83221					
Public Employees Retirement System of Idaho (PERSI) ⇒ Public Employees Retirement System of Idaho (PERSI) [OT]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Non-Federal Retirement Account					
Real Estate Contract ⇒ Real Estate Contract [OT]		\$100,001 - \$250,000	Payment on Contract	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of Dental Office Building					
Westmark Credit Union ⇒		\$100,001 -	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Westmark Credit Union - IRA [IH]		\$250,000			
DESCRIPTION: IRA Account. This is a savings account. There are no underlying assets in this account.					
Westmark Credit Union - Savings Account ⇒ Westmark Credit Union - Savings Account [OT]		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Savings Account.					
Westmark Credit Union - Savings Account ⇒ Westmark Credit Union - Savings Account [OT]	SP	\$100,001 - \$250,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Savings Account.					

* 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?
D.A. Davidson/Stifel ⇒ U.S. Bancorp (USB) [ST]		03/14/2023	P	\$15,001 - \$50,000	
DESCRIPTION: Money Market Fund - US Bancorp					

* 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
State of Idaho	Spouse Honorarium	\$500.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1985	State of Idaho (Public Employee Retirement System)	Pension

April 1991

Idaho National Laboratory (INL)

Pension Plan/Spouse

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

- American Estate & Trust (Accuplan) (Owner: SP)
- D.A. Davidson/Stifel
- D.A. Davidson/Stifel
- Farm Ground (Owner: SP)
LOCATION: US
- Public Employees Retirement System of Idaho (PERSI)
- Real Estate Contract
LOCATION: US
- Westmark Credit Union
- Westmark Credit Union - Savings Account
LOCATION: US
- Westmark Credit Union - Savings Account (Owner: SP)
LOCATION: US

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. Michael K. Simpson , 05/4/2024