



Filing ID #10060213

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. David Schweikert
Status: Member
State/District: AZ01

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?
457(B) PLAN ⇒ BARON GR INST [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
457(B) PLAN ⇒ PTNM R6 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 ⇒ AZ PORTFOLIO 2033 (FIDELITY INDEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AZ Gov't Pension Plan ⇒ PUBLIC SAFETY PERSONNEL RETIREMENT SYSTEM [PE] DESCRIPTION: See Sch. C		Undetermined	Distributions	\$50,001 - \$100,000	<input type="checkbox"/>
INSURANCE ⇒ SFT CORE BOND C2 [MF] DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS.	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
INSURANCE ⇒ SFT INDEX 500 C2 [MF] DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS.	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
INSURANCE ⇒	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFT IVY GROWTH [MF]					
DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS.					
IRA ⇒ Putnam Large Cap Growth Class A (POGAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Putnam Large Cap Value Fund Class Y (PEIYX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
ROTH IRA ⇒ Fidelity Trend Fund (FTRNX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SESC - 401(K) ⇒ BlackRock LifePath Index 2030 [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<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?
IRA ⇒ Putnam Large Cap Growth Class A (POGAX) [MF]	SP	12/7/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment of Capitals Gains.					
IRA ⇒ Putnam Large Cap Value Fund Class Y (PEIYX) [MF]	SP	12/7/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment of Capitals Gains.					

* 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
ProMedTek, Inc.	Spouse Salary	N/A
PUBLIC SAFETY PERSONNEL RETIREMENT SYSTEM	Retirement	\$51,592.32

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	SALLIE MAE/NAVIENT	JAN 2004	STUDENT LOANS	\$15,001 - \$50,000
	FLAGSTAR BANK	MAY 2020	RESIDENTIAL MORTGAGE	\$250,001 - \$500,000
	COPPERSTATE CREDIT UNION	March 2022	Home Equity Line of Credit for Campaign Loan	\$100,001 - \$250,000
	Citi Costco Credit Card	December 2023	Personal Credit Card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2004	ME AND MARICOPA COUNTY	COUNTY SPONSORED 457(b) PLAN.
January 2007	Me and Arizona State Government	State Sponsored Retirement Plan

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">◦ 457(B) PLAN◦ 529 LOCATION: AZ◦ AZ Gov't Pension Plan◦ INSURANCE (Owner: SP)◦ IRA (Owner: SP)◦ ROTH IRA (Owner: DC)◦ SESC - 401(K) (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. David Schweikert , 08/13/2024