Filing ID #10060292

Financial Disclosure Report

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Filer Information

Name: Hon. John Mr Moolenaar
Status: Member
State/District: MI02

Filing Information

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/20/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Money Market Account [BA]	SP	$15,001 - $50,000	Interest	$1 - $200	
Filer Rollover IRA ⇒ Brokerage sweep account [BA]		$1,001 - $15,000	Tax-Deferred		
Filer Rollover IRA ⇒ Fidelity SAI Emerging Markets Index Fund (FERGX) [MF]		$1,001 - $15,000	Tax-Deferred		
Filer Rollover IRA ⇒ Fidelity SAI High Income Fund (FSHGX) [MF]		$1,001 - $15,000	Tax-Deferred		
Filer Rollover IRA ⇒ Fidelity SAI Inflation-Focused Fund (FIFGX) [MF]		$1,001 - $15,000	Tax-Deferred		
Filer Rollover IRA ⇒ Fidelity SAI Long-Term Treasury Bond Index Fund (FBLTX) [MF]		$1,001 - $15,000	Tax-Deferred		
Filer Rollover IRA ⇒ Fidelity SAI Low Duration Income Fund (FZOLX) [MF]		$1,001 - $15,000	Tax-Deferred		
Filer Rollover IRA ⇒		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity SAI Short-Term Bond Fund (FZOMX) [MF]					
Filer Rollover IRA ⇒ Strategic Advisers Fidelity Core Income Fund (FIWGX) [MF]		$50,001 - $100,000	Tax-Deferred		
Filer Rollover IRA ⇒ Strategic Advisers Fidelity Emerging Markets Fund (FGOMX) [MF]		$15,001 - $50,000	Tax-Deferred		
Filer Rollover IRA ⇒ Strategic Advisers Fidelity International Fund (FUSIX) [MF]		$15,001 - $50,000	Tax-Deferred		
Filer Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]		$100,001 - $250,000	Tax-Deferred		
Spouse Rollover IRA ⇒ Fidelity SAI Low Duration Income Fund (FZOLX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Spouse Rollover IRA ⇒ Fidelity SAI Short-Term Bond Fund (FZOMX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Spouse Rollover IRA ⇒ Fidelity SAI U.S. Treasury Bond Index Fund (FUTBX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Spouse Rollover IRA ⇒ Strategic Advisers Fidelity Core Income Fund (FIWGX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Spouse Rollover IRA ⇒ Strategic Advisers Fidelity Emerging Markets Fund (FGOMX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Spouse Rollover IRA ⇒ Strategic Advisers Fidelity International Fund (FUSIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Spouse Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		

* 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?
529 College Savings ⇒ In School Option Plan [OT] Location: US Description: 529 Plan Fund		08/1/2023	S	$1,001 - $15,000	☐
Filer Rollover IRA ⇒ Strategic Advisers Fidelity Core Income Fund (FIWGX) [MF]		01/12/2023	P	$1,001 - $15,000	
Filer Rollover IRA ⇒ Strategic Advisers Fidelity Core Income Fund (FIWGX) [MF]		02/13/2023	P	$1,001 - $15,000	
Filer Rollover IRA ⇒ Strategic Advisers Fidelity Core Income Fund (FIWGX) [MF]		04/10/2023	S (partial)	$1,001 - $15,000	☐
Filer Rollover IRA ⇒ Strategic Advisers Fidelity Core Income Fund (FIWGX) [MF]		05/25/2023	P	$1,001 - $15,000	
Filer Rollover IRA ⇒ Strategic Advisers Fidelity Core Income Fund (FIWGX) [MF]		06/28/2023	P	$1,001 - $15,000	
Filer Rollover IRA ⇒ Strategic Advisers Fidelity Core Income Fund (FIWGX) [MF]		09/27/2023	S (partial)	$1,001 - $15,000	☐
Filer Rollover IRA ⇒ Strategic Advisers Fidelity Emerging Markets Fund (FGOMX) [MF]		05/25/2023	S (partial)	$1,001 - $15,000	☐
Filer Rollover IRA ⇒ Strategic Advisers Fidelity International Fund (FUSIX) [MF]		11/20/2023	P	$1,001 - $15,000	
Filer Rollover IRA ⇒ Strategic Advisers Fidelity International Fund (FUSIX) [MF]		12/28/2023	P	$1,001 - $15,000	
Filer Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]		02/13/2023	S (partial)	$1,001 - $15,000	☐
Filer Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]		05/25/2023	S (partial)	$1,001 - $15,000	☐
Filer Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]		06/28/2023	S (partial)	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Filer Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]		07/14/2023	P	$1,001 - $15,000	
Filer Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]		11/20/2023	S (partial)	$1,001 - $15,000	☐
Filer Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]		12/28/2023	P	$1,001 - $15,000	
Spouse Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]	SP	02/10/2023	S (partial)	$1,001 - $15,000	☐
Spouse Rollover IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]	SP	11/17/2023	S (partial)	$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
JT	Discover Student Loans	December 2020	Student Loan	$10,000 - $15,000
JT	Lake Michigan Credit Union	February 2022	Mortgage (personal residence)	$100,001 - $250,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
October 2003	John Moolenaar & State of Michigan	Continued participation and vested member of the State of Michigan defined contribution pension plan. Assets rolled over by end of reporting period.

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

- 529 College Savings
  Location: MI
- Filer Rollover IRA
- Spouse Rollover 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. John Mr Moolenaar , 08/20/2024