



Filing ID #10060894

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Haley Stevens  
**Status:** Member  
**State/District:** MI11

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 08/9/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Franklin Small -Mid Cap Growth Fund Advisor Class (FSGAX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fundamental Investors, Class F-2 Shares (FINFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Haley Stevens IRA ⇒ RJ Bank Deposit Program [BA]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Haley Stevens IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
JPMorgan Liquid Assets Money Market Fund Capital Shares (CJLXX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
PNC Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
PNC Bank Savings Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
RJ Bank Deposit Program [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ROTH IRA ⇒ Columbia Dividend Income Fund Class I2 (CDDRX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
ROTH IRA ⇒ Fidelity Advisor New Insights Fund: Class I (FINSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ROTH IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
ROTH IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Div Appreciation ETF (VIG) [EF]		\$1,001 - \$15,000	Dividends	\$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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Rocket Mortgage	November 2021	Home Mortgage	\$250,001 - \$500,000
	Sofi	October 2023	Home Renovations	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation Inc	08/5/2023	08/13/2023	Detroit - Tel Aviv - Detroit	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Haley Stevens IRA
- ROTH IRA

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. Haley Stevens , 08/9/2024