



Filing ID #10060915

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Hillary Scholten
Status: Member
State/District: MI03

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?
Fidelity 401(k) ⇒ Fidelity Freedom 2040 Fund: Class K (FSNVX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Lake Michigan Credit Union [BA] DESCRIPTION: Savings & Checking Account		\$15,001 - \$50,000	None		<input type="checkbox"/>
Miller Johnson 401(k) ⇒ Fidelity Emerging Markets Index Fund (FPADX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Miller Johnson 401(k) ⇒ Schwab International Index Fund - Select Shares (SWISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Miller Johnson 401(k) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Miller Johnson 401(k) ⇒ Vanguard Small-Cap Value Index Fd Admiral (VSIAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley 1 ⇒ Cash [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley 1 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley 1 ⇒ MFS Global Equity Fund Class C (MWEEX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley 2 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Morgan Stanley 2 ⇒ MFS Global Equity Fund Class C (MWEEX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley 3 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley 3 ⇒ MFS Global Equity Fund Class C (MWEEX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Mutual of America - Michigan Advocacy Program 403(b) Plan ⇒ Retirement 2035 Fund (MURJX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" 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?
Fidelity 401(k) ⇒ Fidelity Freedom 2040 Fund: Class K (FSNVX) [MF]	SP	06/1/2023	S	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	06/1/2023	P	\$100,001 - \$250,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	06/13/2023	S	\$100,001 - \$250,000	<input type="checkbox"/>
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	11/15/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	12/15/2023	P	\$1,001 - \$15,000	
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	10/2/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	07/31/2023	P	\$100,001 - \$250,000	

* 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

Source	Type	Amount
Calvin University	Spouse Salary	N/A
Institute for Nonprofit News	Spouse's Consulting	N/A
John S. and James L. Knight Foundation	Spouse's Consulting	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Old National Bank	2017	Home mortgage	\$100,001 - \$250,000
JT	Lake Michigan Credit Union	2019	Home equity loan	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2022	Filer and Miller Johnson 401(k) Plan	Continued participation in a defined contribution plan that provides service retirement benefits.
June 2019	Filer and Michigan Advocacy Program 403(b) Plan	Continued participation in a defined contribution plan that provides service retirement benefits.

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 (AIEF)	08/5/2023	08/13/2023	Grand Rapids, MI - Tel Aviv - Grand Rapids, MI	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

- o Fidelity 401(k) (Owner: SP)
- o Miller Johnson 401(k)
- o Morgan Stanley 1 (Owner: DC)
- o Morgan Stanley 2 (Owner: DC)
- o Morgan Stanley 3 (Owner: DC)
- o Mutual of America - Michigan Advocacy Program 403(b) Plan
- o TIAA-CREF (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

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. Hillary Scholten , 08/13/2024