



Filing ID #10061002

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Mariannette Jane Miller-Meeks
Status: Member
State/District: IA01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Baird Core Plus Bond Inst [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DFA Emerging Markets Core Equity Portfolio Inst Class [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DFA Five Year Global Fixed Income [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DFA Global Real Estate Secs [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DFA International Small Cap Value Portfolio Inst Class [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DFA Intl High Relative Profitability Port Inst Class [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DFA Intl Small Company Port Inst Class [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DFA Intl Value III [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DFA Two Year Global Fixed Income [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DFA US High Relative Profitability Insti [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DFA US Large Cap Value III [MF]	JT	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DFA US Micro Cap [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DFA US Small Cap Value [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SPDR Barclays Short Term Treasury ETF [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Stone Ridge Reinsurance risk Premium [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TD Ameritrade Money Market Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ CREF Bond Market R3 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ CREF Equity Index R3 [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ CREF Global Equities R3 [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ CREF Growth R3 [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ CREF Money Market [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ CREF Stock R3 [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ TIAA Traditional [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ TIAA-CREF Money Market Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Vanguard FTSE Developed Markets [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Health Care Fund IRA [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Inter-Term Invt Grade Admiral [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Roth IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Roth IRA [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Short-Term Treasury Admiral [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Small Cap Value Index Admiral [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Total Bond Market Index Admiral [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Total Stock Market [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Value Index Admiral [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vangurd Equity Income Fund I [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Non deductible Traditional IRA					
Voya Financial ⇒ Dodge & Cox International Stock Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 401K through GRHS					
Voya Financial ⇒ Vanguard Dividend Growth Fund Inv [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 401K through GRHS					
Voya Financial ⇒ Vanguard Mid-Cap Index Fund Inst [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 401K through GRHS					
Voya Financial ⇒ Vanguard Small-Cap Index Fund Inst [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 401K through GRHS					
Voya Financial ⇒ Vanguard Total Bond Market Ind F Adm [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 401K through GRHS					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Voya Financial ⇒ Voya Fixed Account [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Voya Financial ⇒ Voya Fixed Plus Account III [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Voya Financial ⇒ Voya Fixed Plus Account III A [MF] DESCRIPTION: Deferred Salary from GRHS		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Voya Financial ⇒ Voya Fixed Plus Account III A [MF] DESCRIPTION: 401K through GRHS		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Voya Financial ⇒ Voya Global Bond Port [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Voya Financial ⇒ Voya Large Cap Growth Port [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Voya Financial ⇒ VY Baron Growth Portfolio [MF] DESCRIPTION: 401K through GRHS		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Voya Financial ⇒ VY Inv OppGlobal Port [MF] DESCRIPTION: 401K through GRHS		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Voya Financial ⇒ VY T Rowe Price Growth Equity [MF] DESCRIPTION: Deferred salary through GRHS		\$15,001 - \$50,000	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

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
US House of Representatives	salary	\$165,300.00
Iowa Public Retirement System	state pension	\$4,972.00
Social Security Administration	spouse social security	\$33,570.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Iowa State Bank	Sept 2010	mortgage on personal residence in Ottumwa, IA (not rented)	\$250,001 - \$500,000

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?
Republican Main Street Partnership	03/30/2023	04/6/2023	Washington, DC - Amnan, Jordan - Washington, DC	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Republican Main Street Partnership	03/16/2023	03/17/2023	Washington, DC - Las Vegas, Nevada - Des Moines, IA	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

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- TIAA-CREF
DESCRIPTION: Retirement Account
- Voya Financial
DESCRIPTION: Candiate 401K with employer Great River Health Systems

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. Mariannette Jane Miller-Meeks , 05/13/2024