



Filing ID #10061559

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Mark Pocan
Status: Member
State/District: WI02

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 07/31/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Budget Signs & Specialties, 100% Interest [OL] LOCATION: Monona/Dane, WI, US DESCRIPTION: business	JT	\$250,001 - \$500,000	Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
Fidelity Blue Chip Growth Fund (FBGRX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Equity Income Fund (FEQIX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Floating Rate High Income (FFRHX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Intermediate Bond Fund (FTHRXX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity New Millennium Fund (FMILX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Settlers Bank [BA]	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
State of Wisconsin Pension [PE] DESCRIPTION: The WI Retirement System is a defined benefit pension that has no underlying holdings.		Undetermined	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
US Treasury I Bond [GS]	JT	\$15,001 - \$50,000	Interest	None	<input type="checkbox"/>
US Treasury I Bond (#2) [GS]	JT	\$15,001 - \$50,000	Interest	None	<input checked="" type="checkbox"/>

* 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?
US Treasury I Bond [GS]	JT	01/21/2023	P	\$15,001 - \$50,000	

* 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
Budget Signs & Specialties	Spouse Salary	N/A
State of Wisconsin Pension	State Pension	\$11,340.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	US Bank	November 2020	Washington DC condo	\$250,001 - \$500,000
	Old National	March 2014	Home mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Proprietor	Budget Signs & Specialties, LLC
Board Member	Humpty Dumpty Institute (Nonprofit Organization)
COMMENTS: Position not compensated	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1999	Myself and State of Wisconsin	continued partnership in State pension plan

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?
Cooperative for Assistance and Relief Everywhere, Inc (CARE)	08/25/2023	09/4/2024	Chicago, IL - Kathamandu, Nepal - Chicago, IL	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Mark Pocan , 07/31/2024