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Financial Disclosure Report

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Filer Information

Name: Hon. David Kustoff
Status: Member
State/District: TN08

Filing Information

Filing Type: Amendment Report
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Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
BankTennessee Accounts [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	
BankTennessee Checking Account #1 [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	
BankTennessee Checking Account #2 [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	
BankTennessee Savings Account #1 [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	
BankTennessee Savings Account #2 [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	
Berkshire Hathaway Inc. New (BRK.B) [ST]	DC	$1,001 - $15,000	None		
Berkshire Hathaway Inc. New (BRK.B) [ST]	DC	$1,001 - $15,000	None		
First Horizon Accounts [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	
KUSA LLC, 50% Interest [OT] Description: Holding company for investment properties currently with no holdings. 50% Undivided Ownership Interest.		$1 - $1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Mass Mutual Whole Life [WU]		$15,001 - $50,000	None		
Mass Mutual Whole Life 2 [WU]		$15,001 - $50,000	None		
Mass Mutual Whole Life 3 [WU]		$15,001 - $50,000	None		
Mass Mutual Whole Life 4 [WU]		$1,001 - $15,000	None		
NH FIDELITY 500 INDEX [5P] LOCATION: TN DESCRIPTION: DC2	DC	$100,001 - $250,000	Tax-Deferred		
NH Portfolio 2024 (Fidelity Index) [MF]	DC	$250,001 - $500,000	Tax-Deferred		
Tennessee Consolidated Retirement System [DB]	SP	$15,001 - $50,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		$100,001 - $250,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ Bank Sweep [BA]		$15,001 - $50,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ Microsoft Corporation (MSFT) [ST]		$100,001 - $250,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ TJX Companies, Inc. (TJX) [ST]		$15,001 - $50,000	Dividends	$2,501 - $5,000	✓
Fidelity Retail Account ⇒ AT&T Inc. (T) [ST]	JT	$1,001 - $15,000	None		
Fidelity Retail Account ⇒ Johnson & Johnson (JNJ) [ST]	JT	$50,001 - $100,000	None		
Fidelity Retail Account ⇒ NextEra Energy, Inc. (NEE) [ST]	JT	$50,001 - $100,000	None		
Fidelity Retail Account ⇒ Vanguard 500 Index Fund Admiral (VFIAX) [MF]	JT	$100,001 - $250,000	Dividends	$2,501 - $5,000	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Retail Account ⇒ Vanguard Dividend Growth Fund (VDIGX) [MF]	JT	$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	☐
Fidelity Retail Account ⇒ Walt Disney Company (DIS) [ST]	JT	$1,001 - $15,000	None		☐
Fidelity Retail Account ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]	JT	$1,001 - $15,000	None		☐
FIDELITY ROLLOVER IRA ⇒ Apple Inc. (AAPL) [ST]		$100,001 - $250,000	Tax-Deferred		☐
FIDELITY ROLLOVER IRA ⇒ Costco Wholesale Corporation (COST) [ST]		$50,001 - $100,000	Tax-Deferred		☐
FIDELITY ROLLOVER IRA ⇒ FIDELITY GOVERNMENT CASH RESERVES [BA]		$1,001 - $15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ AMERICA NEW PERSPECTIVE CLASS A [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ AMERICAN CAPITAL INCOME BUILDER CL A [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ AMERICAN EUROPACIFIC GROWTH CLASS A [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ AMERICAN GROWTH FUND OF AMERICA CLASS A [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ AMERICAN INVESTMENT CO OF AMERICA [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ AMERICAN WASHNTN MUTUAL INVESTRS CL A [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ FIDELITY GOVERNMENT CASH [BA]	SP	$1 - $1,000	Tax-Deferred		☐
Fidelity SEP-IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		$100,001 - $250,000	Tax-Deferred		☐
Fidelity SEP-IRA ⇒		$1,001 - $15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Citibank Deposit IRA [BA]					
Fidelity SEP-IRA ⇒ Clear Secure, Inc. Class A Common Stock (YOU) [ST]		None	None		✓
Fidelity SEP-IRA ⇒ Home Depot, Inc. (HD) [ST]		$50,001 - $100,000	Tax-Deferred		
Fidelity SEP-IRA ⇒ ISHARES NASDAQ BIOTECHNOLOGY ETF [EF]		$50,001 - $100,000	Tax-Deferred		
Fidelity SEP-IRA ⇒ Netflix, Inc. (NFLX) [ST]		$100,001 - $250,000	Tax-Deferred		
Fidelity SEP-IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		$15,001 - $50,000	Tax-Deferred		✓
Fidelity SEP-IRA ⇒ POWERSHARES QQQ TR UNIT SER 1 [EF]		$15,001 - $50,000	Tax-Deferred		
Fidelity SEP-IRA ⇒ Truist Deposit IRA [BA]		$1,001 - $15,000	Tax-Deferred		
Fidelity SEP-IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		$1,001 - $15,000	Tax-Deferred		✓
Fidelity SEP-IRA ⇒ Wells Fargo Deposit [BA]		$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ ALLIANZGI NFJ LARGE CAP VALUE CL - PNBAX [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ FID STOCK SELECTOR LARGE CAP VALUE FD [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ FIDELITY ADVISOR DIVERSIFIED INTL A [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ FIDELITY BLUE CHIP GROWTH [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Fidelity Government Cash [BA]	SP	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Traditional IRA ⇒ FIDELITY NEW MILLENNIUM [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ FIDELITY OVERSEAS [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ FIDELITY SELECT HEALTH CARE [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ FIDELITY SELECT TRANSPORT [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ FIDELITY VALUE [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ SPDR S&P 500 ETF TRUST UNIT SER 1 S&P [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ VANGUARD INDEX FDS MID CAP [EF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Vanguard Index FDS Vanguard Total STK [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity UTMA Account ⇒ AT&T Inc. (T) [ST]	DC	$1 - $1,000	Dividends	$1 - $200	
Fidelity UTMA Account ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	DC	$1,001 - $15,000	None		
Fidelity UTMA Account ⇒ Exxon Mobil Corporation (XOM) [ST]	DC	$1,001 - $15,000	Dividends	$201 - $1,000	
Fidelity UTMA Account ⇒ FedEx Corporation (FDX) [ST]	DC	$1,001 - $15,000	Dividends	$1 - $200	
Fidelity UTMA Account ⇒ General Electric Company (GE) [ST]	DC	$1 - $1,000	Dividends	$1 - $200	
Fidelity UTMA Account ⇒ Raymond James Bank Deposit [BA]	DC	$1,001 - $15,000	None		
Fidelity UTMA Account ⇒ Vanguard Dividend Growth Fund Investor Class (VDIGX)	DC	$1,001 - $15,000	Dividends	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
[MF]					
Fidelity UTMA Account (2) ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	DC	$1,001 - $15,000	None		☐
Fidelity UTMA Account (2) ⇒ Exxon Mobil Corporation (XOM) [ST]	DC	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Fidelity UTMA Account (2) ⇒ FedEx Corporation (FDX) [ST]	DC	$1,001 - $15,000	Dividends	$1 - $200	☐
Fidelity UTMA Account (2) ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	DC	$1,001 - $15,000	None		☑
Fidelity UTMA Account (2) ⇒ General Electric Company (GE) [ST]	DC	$1,001 - $15,000	Dividends	$1 - $200	☐
Fidelity UTMA Account (2) ⇒ Vanguard Dividend Growth Fund (VDIGX) [MF]	DC	$1,001 - $15,000	Dividends	$1 - $200	☐
Kustoff Family Trust ⇒ BankTennessee [BA]		$1,001 - $15,000	None		☐
Kustoff Family Trust ⇒ Mass Mutual [WU] DESCRIPTION: Whole Life Policy (1/3 interest)		$1,000,001 - $5,000,000	None		☐
Kustoff Family Trust ⇒ Mass Mutual 2 [WU] DESCRIPTION: Whole Life Policy (1/3 interest)		$500,001 - $1,000,000	None		☐
State of Tennessee 401(K) Plan ⇒ Vanguard Instl Trgt Retire 2040 Instl [MF]	SP	$50,001 - $100,000	Tax-Deferred		☐
Traditional IRA GPS Accumulation, P5 ⇒ GuideMark Large Cap Core - GMLGX [MF]	SP	None	Capital Gains	$201 - $1,000	☑
Traditional IRA GPS Accumulation, P5 ⇒ Guidepath Absolute Return Alloc Service CL [MF]	SP	None	None		☑
Traditional IRA GPS Accumulation, P5 ⇒ GuidePath Growth Allocation Fund - GPSTX [MF]	SP	None	Capital Gains	$2,501 - $5,000	☑
Traditional IRA GPS Accumulation, P5 ⇒	SP	None	None		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
GuidePath Managed Futures Strategy - GPMFX [MF]					
Traditional IRA GPS Accumulation, P5 ⇒ GuidePath Tactical Allocation Fund - GPTUX [MF]	SP	None	Capital Gains	$201 - $1,000	☑

* 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 B: Transactions

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Traditional IRA GPS Accumulation, P5 ⇒ Guidemark Large Cap Core Fund Service Shares (GMLGX) [MF]	SP	09/13/2023	S	$1,001 - $15,000	☑
Traditional IRA GPS Accumulation, P5 ⇒ GuidePath Growth Allocation Fund - Service Shares (GPSTX) [MF]	SP	09/13/2023	S	$15,001 - $50,000	☑
Traditional IRA GPS Accumulation, P5 ⇒ GuidePath Managed Futures Strategy Fund - Service Shares (GPMFX) [MF]	SP	09/13/2023	S	$1,001 - $15,000	☐
Traditional IRA GPS Accumulation, P5 ⇒ GuidePath Tactical Allocation Fund - Service Shares (GPTUX) [MF]	SP	09/13/2023	S	$1,001 - $15,000	☑
Traditional IRA GPS Accumulation, P5 ⇒ GuidePath Absolute Return Allocation Fund - Service Shares (GPARX) [MF]	SP	02/09/2023	S	$1,001 - $15,000	☐
Traditional IRA GPS Accumulation, P5 ⇒ Guidemark Large Cap Core Fund Service Shares (GMLGX) [MF]	SP	02/09/2023	P	$1,001 - $15,000	
Fidelity SEP-IRA ⇒ Clear Secure, Inc. Class A Common Stock (YOU) [ST]		03/02/2023	P	$1,001 - $15,000	
Fidelity SEP-IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		08/08/2023	P	$1,001 - $15,000	
Fidelity SEP-IRA ⇒ Clear Secure, Inc. Class A Common Stock (YOU) [ST]		11/06/2023	S	$1,001 - $15,000	☐
Fidelity SEP-IRA ⇒		01/17/2023	P	$15,001 - $50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Clear Secure, Inc. Class A Common Stock (YOU) [ST]					
Fidelity SEP-IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		11/29/2023	P	$15,001 - $50,000	
Charles Schwab Rollover IRA ⇒ TJX Companies, Inc. (TJX) [ST]		03/02/2023	P	$15,001 - $50,000	
Fidelity UTMA Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	DC	12/28/2023	P	$1,001 - $15,000	
Fidelity SEP-IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		11/29/2023	P	$15,001 - $50,000	
Fidelity SEP-IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		08/08/2023	P	$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	Wells Fargo	2012	Mortgage on Primary Residence	$50,001 - $100,000
JT	First Horizon Bank	2018	Line of Credit	$50,001 - $100,000
JT	Chase Bank Mortgage	2020	DC Residence Mortgage	$250,001 - $500,000

Schedule E: Positions

Position	Name of Organization
Member	KUSA, LLC
Council Member	United States Holocaust Memorial Council
Trustee	Kustoff Family Trust

Schedule F: Agreements

None disclosed.

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

- Fidelity Retail Account (Owner: JT)
  Location: US
- Fidelity UTMA Account (Owner: DC)
  Location: US
- Fidelity UTMA Account (2) (Owner: DC)
  Location: US
- Charles Schwab Rollover IRA
- Fidelity Traditional IRA (Owner: SP)
- Fidelity Roth IRA (Owner: SP)
- Fidelity SEP-IRA
- FIDELITY ROLLOVER IRA
- Traditional IRA GPS Accumulation, P5 (Owner: SP)
- Kustoff Family Trust (33% Interest)
- State of Tennessee 401(K) Plan (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. David Kustoff , 08/13/2025