



Filing ID #10056838

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Mr. Mark Messmer  
**Status:** Congressional Candidate  
**State/District:** INo8

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 04/7/2024  
**Period Covered:** 01/01/2023– 03/8/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baird Trust Company - Roth IRA #1 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Baird Trust Company - Roth IRA #1 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #1 ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #1 ⇒ iShares Russell 2000 ETF (IWM) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #1 ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #1 ⇒ Money Market Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #1 ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Baird Trust Company - Roth IRA #2 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Baird Trust Company - Roth IRA #2 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #2 ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #2 ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #2 ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #2 ⇒ Money Market Account [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Baird Trust Company - Roth IRA #2 ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
BNY Mellon Investment Management account ⇒ BNY Mellon Research Growth Fund, Inc. Class A (DWOAX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Capital Group American Funds account ⇒ AMCAP Fund, Class A Shares A (AMCPX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Capital Group American Funds account ⇒ American Funds New Economy Fund A (ANEFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Capital Group American Funds account ⇒ Capital Income Builder Cl A Shs (CAIBX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Capital Group American Funds account ⇒ Fundamental Investors, Class A Shares (ANCFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Capital Group American Funds account ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Catholic Financial Life, Whole Life Insurance [WU]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
D.A. Davidson account ⇒ Bank Deposit Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
D.A. Davidson account ⇒ SVB&T CORP (SVBT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
EMR, LLC ⇒ Commerical Office Property [RP]  LOCATION: Jasper, IN, US		\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	\$5,001 - \$15,000
EMR, LLC ⇒ Residential Rental Property #1 [RP]  LOCATION: Jasper, IN, US		\$250,001 - \$500,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
EMR, LLC ⇒ Residential Rental Property #2 [RP]  LOCATION: Jasper, IN, US		\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	\$5,001 - \$15,000
EMR, LLC ⇒ Storage Property [RP]  LOCATION: Jasper, IN, US		\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	\$5,001 - \$15,000
EMR, LLC ⇒ Undeveloped Lot #1 [RP]  LOCATION: Jasper, IN, US		\$15,001 - \$50,000	None		
EMR, LLC ⇒ Undeveloped Lot #2 [RP]  LOCATION: Jasper, IN, US		\$15,001 - \$50,000	None		
EMR, LLC ⇒ Undeveloped Lot #3 [RP]  LOCATION: Jasper, IN, US		\$15,001 - \$50,000	None		
EMR, LLC ⇒ Warehouse Property [RP]  LOCATION: Jasper, IN, US		\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
Indiana Deferred Compensation Matching Plan (401(a) Plan) ⇒ State Street Target Retirement 2025 Fund Class K (SSBSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Indiana Farm Bureau Insurance, Whole Life		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Insurance [WU]					
Indiana Public Employees' Deferred Compensation Plan (457(b) Plan) ⇒ State Street Target Retirement 2025 Fund Class K (SSBSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Indiana Public Retirement System Legislators' Defined Contribution Fund ⇒ INPRS 2030 Fund [GS]		\$250,001 - \$500,000	Tax-Deferred		
Kimberly A Messmer, Inc. [OL]  LOCATION: Jasper, IN, US DESCRIPTION: Cosmetics	SP	\$15,001 - \$50,000	Dividends	None	\$50,001 - \$100,000
Knights of Columbus, Whole Life Insurance #1 [WU]		\$50,001 - \$100,000	Tax-Deferred		
Knights of Columbus, Whole Life Insurance #2 [WU]		\$1,001 - \$15,000	Tax-Deferred		
Knights of Columbus, Whole Life Insurance #3 [WU]		\$1,001 - \$15,000	Tax-Deferred		
Knights of Columbus, Whole Life Insurance #4 [WU]	SP	\$1,001 - \$15,000	Tax-Deferred		
Knights of Columbus, Whole Life Insurance #5 [WU]	SP	\$15,001 - \$50,000	Tax-Deferred		
Messmer Mechanical, Inc. [OL]  LOCATION: Jasper, IN, US DESCRIPTION: Plumbing, heating and air conditioning services.		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	\$100,001 - \$1,000,000
Messmer Mechanical, Inc. 401(k) Plan ⇒ Vanguard Target Retirement 2030 Fund (VTHR) [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
MKCC, LLC ⇒ Agricultural Land [FA]  LOCATION: Dubois County, IN, US DESCRIPTION: Timber and Crops		\$250,001 - \$500,000	Rent	None	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Northwestern Mutual, Whole Life Insurance #1 [WU]		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual, Whole Life Insurance #2 [WU]	SP	\$15,001 - \$50,000	Tax-Deferred		
Roger's Grill Company LLC [OL] LOCATION: Jasper, IN, US DESCRIPTION: Grill design and fabrication		None	None		
Springs Valley Bank & Trust accounts [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
UMB Health Savings Account [BA]		\$1,001 - \$15,000	None		

\* 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 Current Year to Filing	Amount Preceding Year
State of Indiana (General Assembly)	Salary	\$46,809.44	\$73,771.28
Messmer Mechanical, Inc.	Salary	\$16,800.00	\$63,561.55
Kimberly A Messmer, Inc.	Spouse salary	N/A	N/A

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Vice President	Messmer Mechanical, Inc.
State Senator	Indiana General Assembly
Secretary	Kimberly A Messmer, Inc.
Member	MKCC, LLC
Member	EMR, LLC

Member	Rogers Grill Company, LLC
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## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2008	Mark B. Messmer and State of Indiana	Continuing participation in the Indiana Public Retirement System (INPRS) - Defined Contribution Plan
November 2008	Mark B. Messmer and State of Indiana	Continuing participation in the State of Indiana Deferred Compensation Plan - 457(b) and 401(a) Plans

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Baird Trust Company - Roth IRA #1
- Baird Trust Company - Roth IRA #2 (Owner: SP)
- BNY Mellon Investment Management account
- Capital Group American Funds account
- D.A. Davidson account
- EMR, LLC  
LOCATION: Jasper, IN, US
- Indiana Deferred Compensation Matching Plan (401(a) Plan)
- Indiana Public Employees' Deferred Compensation Plan (457(b) Plan)
- Indiana Public Retirement System Legislators' Defined Contribution Fund
- Messmer Mechanical, Inc. 401(k) Plan
- MKCC, LLC  
LOCATION: Jasper, IN, US

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**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:** Mr. Mark Messmer , 04/7/2024