



Filing ID #10056944

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Jefferson Shreve
Status: Congressional Candidate
State/District: INo6

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 04/5/2024
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
Advisory Account holding Structured Notes ⇒ Barclays 2 yr Digital Note INDU/RTY [CS] DESCRIPTION: Structured Note		\$5,000,001 - \$25,000,000	Capital Gains	None	None
Advisory Account holding Structured Notes ⇒ BNP Paribas 3 yr Dual Direction Buffered Note SPX [CS] DESCRIPTION: Structured Note		\$5,000,001 - \$25,000,000	Capital Gains	None	None
Advisory Account holding Structured Notes ⇒ BNP Paribas 4 yr Barrier Note INDU/RTY [CS] DESCRIPTION: Structured Note		\$5,000,001 - \$25,000,000	Capital Gains	None	None
Advisory Account holding Structured Notes ⇒ BNP Paribas 5 yr Barrier Note INDU/NDX/RTY [CS] DESCRIPTION: Structured Note		\$5,000,001 - \$25,000,000	Capital Gains	None	None
Advisory Account holding Structured Notes ⇒ JP Morgan 12-Month Digital Barrier Note [CS] DESCRIPTION: Structured Note		\$5,000,001 - \$25,000,000	Capital Gains	None	None
Advisory Account holding Structured Notes ⇒		\$5,000,001 -	Capital Gains	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JP Morgan 2.5 yr Dual Direction Buffered Note INDU/NDX [CS]		\$25,000,000			
DESCRIPTION: Structured Note					
Breffnimor LLC ⇒ Residential Property 1 [OL]		\$1,000,001 - \$5,000,000	None		
LOCATION: Indianapolis, IN, US DESCRIPTION: Residential Property					
Carmichael Center LP ⇒ Residential Property 1, 12% Interest [OL]		\$1,000,001 - \$5,000,000	None		
LOCATION: Bloomington, IN, US DESCRIPTION: Residential Property					
Chase Bank Checking Account ⇒ Chase Bank Checking Account [OT]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: Checking Account					
CRT - NIMCRUT ⇒ Fidelity Insti Money Market Funds Money Market Port - Inst Cl (FNSXX) [MF]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	None
CRT - Standard Unit Trust ⇒ Fidelity Insti Money Market Funds Money Market Port - Inst Cl (FNSXX) [MF]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	None
EXR OP Units Account ⇒ Extra Space Storage Inc Common Stock (EXR) [ST]		Over \$50,000,000	Dividends	\$1,000,001 - \$5,000,000	None
Fixed Indexed Annuity ⇒ AIG Power Protector S&P 500 point-to-point [FN]		\$5,000,001 - \$25,000,000	Tax-Deferred		
Fixed Indexed Annuity ⇒ Athene Accumulator S&P 500 point-to-point [FN]		\$5,000,001 - \$25,000,000	Tax-Deferred		
Fixed Indexed Annuity ⇒ Global Atlantic Fore Accumulation 5 S&P 500 point-to-point [FN]		\$5,000,001 - \$25,000,000	Tax-Deferred		
Fixed Indexed Annuity ⇒ Global Atlantic Fore Accumulation 5 S&P 500 trigger [FN]		\$5,000,001 - \$25,000,000	Tax-Deferred		
Fixed Indexed Annuity ⇒ Lincoln Optiblend 5 S&P 500 Trigger [FN]		\$5,000,001 - \$25,000,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fixed Indexed Annuity ⇒ Mass Mutual S&P 500 point-to-point [FN]		\$5,000,001 - \$25,000,000	Tax-Deferred		
Lincoln Level Advantage S&P 500 ⇒ Lincoln Level Advantage S&P 500 [OP]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Buffered Index Annuity					
Northwest Bancshares, Inc. - Common Stock (NWBI) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Old National Bank Accounts ⇒ ONB Joint Checking [OT]		\$500,001 - \$1,000,000	Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: ONB Joint Checking Account					
Old National Bank Accounts ⇒ ONB Money Market [OT]		\$25,000,001 - \$50,000,000	Dividends	\$1,000,001 - \$5,000,000	\$1,000,001 - \$5,000,000
DESCRIPTION: ONB Money Market					
Old National Bank Accounts ⇒ ONB Perry Properties Checking Account [OT]		\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: ONB Perry Property Checking Account					
Old National Bank Accounts ⇒ ONB Personal Checking [OT]		\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: ONB Personal Checking Account					
Old National Bank Accounts ⇒ Shreve & Company Checking [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Shreve & Company Checking					
Old National Bank Accounts ⇒ Storage Express Construction Checking [OT]		\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Storage Express Construction Checking					
Opportunity Zone Funds ⇒ Cantor Fitzgerald Opportunity Zone Fund [RE]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends	None	None
Opportunity Zone Funds ⇒ Griffin Capital Opportunity Zone Fund III [RE]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends	None	None
Opportunity Zone Funds ⇒ Inland Self Storage Opportunity Zone Fund [RE]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Opportunity Zone Funds ⇒ Inland Student Housing Opportunity Zone Fund [RE]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	None
Opportunity Zone Funds ⇒ Pacific Oak Opportunity Zone Fund [RE]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	None	None
Perry Properties LLC ⇒ Residential Property 1 [RP] LOCATION: Indianapolis, IN, US		\$100,001 - \$250,000	None		
Perry Properties LLC ⇒ Residential Property 2 [RP] LOCATION: Indianapolis, IN, US		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
Perry Properties LLC ⇒ Residential Property 3 [OL] LOCATION: Indianapolis, IN, US DESCRIPTION: Residential Property		\$100,001 - \$250,000	None		
Perry Properties LLC ⇒ Residential Property 4 [OL] LOCATION: Indianapolis, IN, US DESCRIPTION: Residential Property		\$250,001 - \$500,000	None		
Pershing Brokerage Account ⇒ Fidelity Insti Money Market Funds Money Market Port - Inst Cl (FNSXX) [MF]		\$25,000,001 - \$50,000,000	Dividends	\$1,000,001 - \$5,000,000	None
Registered Index Linked Annuity (RILA) ⇒ Allianz Buffered Annuity - S&P 500 Dual Direction Trigger [OT] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Allianz Buffered Annuity - S&P 500 Trigger [OP] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Brighthouse Buffered Annuity Russell 2000 Trigger Rate [OP] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Equitable S&P 500 Dual Direction Trggier [OT] DESCRIPTION: Buffered Index Annuity		\$1,000,001 - \$5,000,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Registered Index Linked Annuity (RILA) ⇒ Jackson National Buffered Annuity S&P 500 Annual cap rate [OP] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Jackson National Buffered Annuity S&P 500 with Annual cap rate and enhanced participation [OT] DESCRIPTION: Buffered Index Annuity		\$1,000,001 - \$5,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Lincoln Level Advantage 3 year First Trust Cap Strength [OT] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Lincoln Level Advantage 6 year First Trust American Leadership [OT] DESCRIPTION: Buffered Index Annuity		\$1,000,001 - \$5,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Lincoln Level Advantage 6 year First Trust Cap Strength [OT] DESCRIPTION: Buffered Index Annuity		\$1,000,001 - \$5,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Lincoln Level Advantage Buffered Annuity - S&P 500 trigger [OP] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Lincoln Level Advantage Buffered Annuity S&P 500 Cap [OP] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Prudential Buffered Annuity - S&P 500 Tiered Participation [OT] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		
Registered Index Linked Annuity (RILA) ⇒ Prudential Buffered Annuity - S&P 500 Trigger Rate Plus [OT] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Registered Index Linked Annuity (RILA) ⇒ Symetra Buffered Annuity S&P 500 with enhanced participation [OT] DESCRIPTION: Buffered Index Annuity		\$5,000,001 - \$25,000,000	Tax-Deferred		
Storage Express Construction ⇒ Storage Express Construction LLC [OL] LOCATION: Bloomington, IN, US DESCRIPTION: Storage Express Construction LLC		\$250,001 - \$500,000	Business Income	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Universal Indexed Life Insurance ⇒ Midland Life Insurance Policy I [OT] DESCRIPTION: Universal Indexed Life Insurance		\$1,000,001 - \$5,000,000	None		
Universal Indexed Life Insurance ⇒ Midland Life Insurance Policy II [OT] DESCRIPTION: Universal Indexed Life Insurance		\$500,001 - \$1,000,000	None		
Universal Indexed Life Insurance ⇒ Midland Life Insurance Policy III [OT] DESCRIPTION: Universal Indexed Life Insurance		\$15,001 - \$50,000	None		
Universal Indexed Life Insurance ⇒ Midland Life Insurance Policy IV [OT] DESCRIPTION: Universal Life and LTC Insurance		\$50,001 - \$100,000	None		
Universal Indexed Life Insurance ⇒ Nationwide Life Insurance Policy [OT] DESCRIPTION: Universal Indexed Life Insurance		\$5,000,001 - \$25,000,000	None		
Universal Indexed Life Insurance ⇒ Protective Life Insurance [OT] DESCRIPTION: Univeral Life and LTC Policy		\$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
Extra Space Storage (EXR)	Board of Directors	\$225,000.00	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Indiana State Chamber of Commerce
Board Member	Indiana University Indianapolis Chancellor's Board
Board Member	Indiana University Executive Dean's Advisory Board

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">◦ Advisory Account holding Structured Notes◦ Breffnimor LLC LOCATION: US◦ Carmichael Center LP (12% Interest) LOCATION: US◦ Chase Bank Checking Account LOCATION: US◦ CRT - NIMCRUT◦ CRT - Standard Unit Trust◦ EXR OP Units Account◦ Fixed Indexed Annuity LOCATION: US◦ Lincoln Level Advantage S&P 500◦ Old National Bank Accounts LOCATION: US◦ Opportunity Zone Funds LOCATION: US◦ Perry Properties LLC LOCATION: US◦ Pershing Brokerage Account◦ Registered Index Linked Annuity (RILA)◦ Storage Express Construction LOCATION: US

- Universal Indexed Life Insurance
LOCATION: 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: Jefferson Shreve , 04/5/2024