Financial Disclosure Report

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Filer Information

Name: Kyle Kilbourn
Status: Congressional Candidate
State/District: WI07

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 04/20/2024
Period Covered: 01/01/2023– 04/15/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Savings - Goldman Sachs ⇒ Apple Saving - Goldman Sachs [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Citi Bank Savings ⇒ Citi Bank Savings [BA]	JT	$15,001 - $50,000	Interest	$201 - $1,000	$1,001 - $2,500
IRA PLAN 9223 ⇒ Ameriprise Bank Insured Sweep Account (ABISA) [BA]		$1,001 - $15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ BLACKROCK TECHNOLOGY OPPTYS INSTL CL BGSIX [MF]		$15,001 - $50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ BNY Mellon Dynamic Value Fund Class I (DRGVX) [MF]		$50,001 - $100,000	Tax-Deferred		
IRA PLAN 9223 ⇒ FIDELITY ADVISOR GROWTH OPPTYS CL I FAGCX [MF]		$15,001 - $50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ GOLDMAN SACHS GQG PARTNERS INTL OPPTYS		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
INVESTOR CL GSINX [MF]					
IRA PLAN 9223 ⇒ GUGGENHEIM TOTAL RETURN BOND INSTL CL GIBIX [MF]		$1,001 - $15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ INVESCO SMALL CAP VALUE CL Y VSMIX [MF]		$15,001 - $50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ JOHN HANCOCK BOND CL I JHBIX [MF]		$1,001 - $15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ JPMORGAN EQUITY INCOME CL I [MF]		$15,001 - $50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ LoCorr Macro Strategies Fund - Class I (LFMIX) [MF]		$1,001 - $15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ MAINSTAY MACKAY U S INFRA BOND CL I MGOIX [MF]		None	Tax-Deferred		
IRA PLAN 9223 ⇒ MFS VALUE CL I MEIIX [MF]		None	Tax-Deferred		
IRA PLAN 9223 ⇒ PGIM JENNISON GLOBAL OPPTYS CL Z PRJZX [MF]		$15,001 - $50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ PIMCO INCOME CL I2 PONPX [MF]		$1,001 - $15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ PUTNAM SMALL CAP GROWTH CL Y PSYGX [MF]		$15,001 - $50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ VIRTUS KAR INTL SMALL MID CAP CL I VIISX [MF]		$1,001 - $15,000	Tax-Deferred		
Residential Short Term Rental Property in Puerto Vallarta [RP] LOCATION: Puerto Vallarta, MX	JT	$100,001 - $250,000	Rent	$5,001 - $15,000	$5,001 - $15,000
ROTH IRA PLAN 0458 ⇒ Ameriprise Bank Insured Sweep Account (ABISA) [BA]		$1,001 - $15,000	Interest	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ROTH IRA PLAN 0458 ⇒ BLACKROCK TACTICAL OPPTYS INSTL CL PBAIX [MF]		$1,001 - $15,000	Dividends	$1 - $200	None
ROTH IRA PLAN 0458 ⇒ FEDERATED HERMES TOTAL RETURN BOND INSTL CL FTRBX [MF]		$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
ROTH IRA PLAN 0458 ⇒ FIDELITY ADVISOR INTL CAP APPREC CL I FCPIX [MF]		$15,001 - $50,000	Dividends	$1 - $200	None
ROTH IRA PLAN 0458 ⇒ GOLDMAN SACHS GQG PARTNERS INTL OPPTYS INVESTOR CL GSINX [MF]		$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
ROTH IRA PLAN 0458 ⇒ GOLDMAN SACHS U S EQUITY DIVIDEND & PREMIUM INVESTOR CL GVIRX [MF]		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
ROTH IRA PLAN 0458 ⇒ ISHARES 20+ YR TREASURY BOND ETF TLT [EF]		$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
ROTH IRA PLAN 0458 ⇒ ISHARES 7-10YR TREASURY BOND ETF IEF [EF]		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
ROTH IRA PLAN 0458 ⇒ ISHARES MSCI USA QUALITY FACTOR ETF QUAL [EF]		$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
ROTH IRA PLAN 0458 ⇒ JPMORGAN EQUITY INCOME CL I HLIEX [MF]		$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
ROTH IRA PLAN 0458 ⇒ PGIM TOTAL RETURN BOND CL Z PDBZX [MF]		$1,001 - $15,000	Dividends	$201 - $1,000	$1 - $200
ROTH IRA PLAN 0458 ⇒ VANGUARD MID CAP ETF VO [EF]		$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
ROTH IRA PLAN 0458 ⇒ VANGUARD S&P 500 INDEX ETF VOO [EF]		$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
ROTH IRA PLAN 0458 ⇒ VANGUARD SMALL CAP ETF VB [EF]		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
ROTH IRA PLAN 0458 ⇒		$1,001 - $15,000	Dividends	$1 - $200	$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VIRTUS ALPHASIMPLEX MANAGED FUTURES STRATEGY CL I ASFYX [MF]					$1,000
ROTH IRA PLAN 0458 ⇒ VIRTUS KAR LONG SHORT EQUITY CL I VLSIX [MF]		$1,001 - $15,000	Dividends	None	None
SPOUSE AND SELF JT 3863 ⇒ Ameriprise Insured Money Market (AIMMA) [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
SPOUSE AND SELF JT 3863 ⇒ CONSUMER DISCRETIONARY SELECT SECTOR SPDR ETF XLY [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE AND SELF JT 3863 ⇒ ISHARES CORE MSCI EMERGING MARKETS ETF IEMG [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE AND SELF JT 3863 ⇒ ISHARES CORE S&P MID CAP ETF IJH [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE AND SELF JT 3863 ⇒ ISHARES GLOBAL ENERGY ETF IXC [EF]	JT	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE AND SELF JT 3863 ⇒ SECTOR CONSUMER STAPLES SELECT SECTOR SPDR ETF XLP [EF]	JT	None	Dividends	Not Applicable	$201 - $1,000
SPOUSE AND SELF JT 3863 ⇒ SECTOR FINANCIAL SELECT SECTOR SPDR ETF XLF [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$1 - $200
SPOUSE AND SELF JT 3863 ⇒ SECTOR HEALTHCARE SELECT SECTOR SPDR ETF XLV [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE AND SELF JT 3863 ⇒ SECTOR INDUSTRIAL SELECT SECTOR SPDR ETF XLI [EF]	JT	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
SPOUSE AND SELF JT 3863 ⇒ SECTOR TECHNOLOGY SELECT SECTOR SPDR ETF XLK [EF]	JT	$50,001 - $100,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE AND SELF JT 3863 ⇒ SELECT SECTOR COMMUNICATION SERVICES	JT	$15,001 - $50,000	Dividends	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SELECT SECTOR SPDR ETF XLC [EF]					
SPOUSE AND SELF JT 3863 ⇒ SPDR PORTFOLIO DEVELOPED WORLD EX-US ETF SPDW [EF]	JT	$50,001 - $100,000	Dividends	$1,001 - $2,500	$1,001 - $2,500
SPOUSE AND SELF JT 3863 ⇒ VANGUARD SMALL CAP ETF VB [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE AND SELF JT 7019 ⇒ BlackRock High Yield Bond Portfolio - Institutional (BHYIX) [MF]	JT	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	$201 - $1,000
SPOUSE AND SELF JT 7019 ⇒ BLACKROCK MULTI ASSET INCOME INSTL CL BIICX [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
SPOUSE AND SELF JT 7019 ⇒ BLACKROCK STRATEGIC INCOME OPPTYS INSTL CL BSIIX [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE AND SELF JT 7019 ⇒ FEDERATED HERMES TOTAL RETURN BOND INSTL CL FTRBX [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
SPOUSE AND SELF JT 7019 ⇒ JANUS HENDERSON MULTI SECTOR INCOME CL I JMUIX [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$1,001 - $2,500
SPOUSE AND SELF JT 7019 ⇒ MAINSTAY MACKAY U S INFRA BOND CL I MGOIX [MF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE AND SELF JT 7019 ⇒ METROPOLITAN WEST HIGH YIELD BOND CL I MWHIX [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	$1 - $200
SPOUSE AND SELF JT 7019 ⇒ PGIM TOTAL RETURN BOND CL Z PDBZX [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$1,001 - $2,500
SPOUSE AND SELF JT 7019 ⇒ PUTNAM MORTGAGE OPPTYS CL Y PMOYX [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
SPOUSE IRA PLAN 4949 ⇒ Ameriprise Bank Insured Sweep Account (ABISA) [IH]	SP	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SPOUSE IRA PLAN 4949 ⇒ CONSUMER DISCRETIONARY SELECT SECTOR SPDR ETF XLY [EF]	SP	$15,001 - $50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ ISHARES GLOBAL CLEAN ENERGY ETF ICLN [EF]	SP	$1,001 - $15,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ JPMORGAN U S SUSTAINABLE LEADERS CL I JIISX [MF]	SP	$15,001 - $50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SECTOR FINANCIAL SELECT SECTOR SPDR ETF XLF [EF]	SP	$1,001 - $15,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SECTOR HEALTHCARE SELECT SECTOR SPDR ETF XLV [EF]	SP	$15,001 - $50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SECTOR TECHNOLOGY SELECT SECTOR SPDR ETF XLK [EF]	SP	$15,001 - $50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SELECT SECTOR COMMUNICATION SERVICES SELECT SECTOR SPDR ETF XLC [EF]	SP	$1,001 - $15,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SPDR MSCI ACWI CLIMATE PARIS ALIGNED ETF NZAC [EF]	SP	$15,001 - $50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ VANGUARD ESG INTL STOCK ETF VSGX [EF]	SP	$50,001 - $100,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ VANGUARD SMALL CAP ETF VB [EF]	SP	$15,001 - $50,000	Tax-Deferred		
SPOUSE ROTH IRA PLAN 8361 ⇒ Ameriprise Bank Insured Sweep Account (ABISA) [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
SPOUSE ROTH IRA PLAN 8361 ⇒	SP	$1,001 - $15,000	Dividends	$1 - $200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BLACKROCK TACTICAL OPPTYS INSTL CL PBAIX [MF]					
SPOUSE ROTH IRA PLAN 8361 ⇒ FEDERATED HERMES TOTAL RETURN BOND INSTL CL FTRBX [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE ROTH IRA PLAN 8361 ⇒ FIDELITY ADVISOR INTL CAP APPREC CL I FCPIX [MF]	SP	$15,001 - $50,000	Dividends	$1 - $200	None
SPOUSE ROTH IRA PLAN 8361 ⇒ GOLDMAN SACHS GQG PARTNERS INTL OPPTYS INVESTOR CL GSINX [MF]	SP	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE ROTH IRA PLAN 8361 ⇒ GOLDMAN SACHS U S EQUITY DIVIDEND & PREMIUM INVESTOR CL GVIRX [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
SPOUSE ROTH IRA PLAN 8361 ⇒ ISHARES 20+ YR TREASURY BOND ETF TLT [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE ROTH IRA PLAN 8361 ⇒ ISHARES 7-10YR TREASURY BOND ETF IEF [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
SPOUSE ROTH IRA PLAN 8361 ⇒ ISHARES MSCI USA QUALITY FACTOR ETF QUAL [EF]	SP	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE ROTH IRA PLAN 8361 ⇒ JPMORGAN EQUITY INCOME CL I HLIEX [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE ROTH IRA PLAN 8361 ⇒ PGIM TOTAL RETURN BOND CL Z PDBZX [MF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$1 - $200
SPOUSE ROTH IRA PLAN 8361 ⇒ VANGUARD MID CAP ETF VO [EF]	SP	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE ROTH IRA PLAN 8361 ⇒ VANGUARD S&P 500 INDEX ETF VOO [EF]	SP	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
SPOUSE ROTH IRA PLAN 8361 ⇒ VANGUARD SMALL CAP ETF VB [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
SPOUSE ROTH IRA PLAN 8361 ⇒ VIRTUS ALPHASIMPLEX MANAGED FUTURES STRATEGY CL I ASFYX [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SPOUSE ROTH IRA PLAN 8361 ⇒ VIRTUS KAR LONG SHORT EQUITY CL I VLSIX [MF]	SP	$1,001 - $15,000	Dividends	None	None
US Bank Account ⇒ US Bank Accounts [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200

* 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
Bright Health Group Management Inc	Spouse Salary	N/A	N/A
Wisconsin Department of Workforce Development	Spouse salary - unemployment	N/A	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

Position	Name of Organization
Principal Design Strategist (no longer held)	Target Corporation

Schedule F: Agreements

None disclosed.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Investment Vehicle Details

- Apple Savings - Goldman Sachs (Owner: SP)
  Location: US
- Citi Bank Savings (Owner: JT)
  Location: US
- IRA PLAN 9223
  Description: Ameriprise IRA

- ROTH IRA PLAN 0458
  Description: Ameriprise IRA Roth
- SPOUSE AND SELF JT 3863 (Owner: JT)
  Location: US
  Description: Ameriprise Non-Qualified Managed Brokerage Account
- SPOUSE AND SELF JT 7019 (Owner: JT)
  Location: US
  Description: Ameriprise Non-Qualified Managed Brokerage Account
- SPOUSE IRA PLAN 4949 (Owner: SP)
  Description: Ameriprise IRA
- SPOUSE ROTH IRA PLAN 8361 (Owner: SP)
  Description: Ameriprise Roth IRA
- US Bank Account (Owner: JT)
  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: Kyle Kilbourn , 04/20/2024