Financial Disclosure Report

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Filer Information

Name: Thomas More Barrett
Status: Congressional Candidate
State/District: MI07

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/15/2024
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
IRA ⇒ Insured Cash Account [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ Invesco Aerospace & Defense [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ Invesco Aerospace & Defense [EF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	$201 - $1,000
IRA ⇒ iShares Core MSCI Intl Dev Mkts [EF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
IRA ⇒ iShares Core MSCI Intl Dev Mkts [EF]		$15,001 - $50,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ iShares Core S&P Small-Cap ETF [EF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	$201 - $1,000
IRA ⇒ iShares Core S&P Small-Cap ETF [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA ⇒ iShares Residential and Multisector Real Estate [EF]	SP	$1,001 - $15,000	Capital Gains	$1 - $200	$1 - $200
IRA ⇒ iShares Residential and Multisector Real Estate [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ iShares U.S. Home Construction ETF [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ iShares U.S. Home Construction ETF [EF]	SP	$1,001 - $15,000	Capital Gains	$201 - $1,000	$201 - $1,000
IRA ⇒ Pacer Fds Tr Us Cash Cows 100 [EF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
IRA ⇒ Pacer Fds Tr Us Cash Cows 100 [EF]		$1 - $1,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ Pacer Fds Tr Us Cash Cows 100 [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ Schwab Bank Sweep [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
IRA ⇒ Vanguard FTSE Emerging Markets [EF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ Vanguard FTSE Emerging Markets [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ Vanguard Large-Cap Index Fund ETF [EF]	SP	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
IRA ⇒ Vanguard Large-Cap Index Fund ETF [EF]		$50,001 - $100,000	Capital Gains, Dividends	$201 - $1,000	$1 - $200
IRA ⇒ Vanguard Mid-Cap [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
IRA ⇒ Vanguard Mid-Cap [EF]	SP	$1,001 - $15,000	Capital Gains	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Personal Account [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Roth IRA ⇒ Insured Cash Account [EF]		$1 - $1,000	Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ Invesco Aerospace & Defense [EF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ iShares Core MSCI Intl Dev Mkts [EF]	SP	$1,001 - $15,000	Capital Gains	$201 - $1,000	$1 - $200
Roth IRA ⇒ iShares Core MSCI Intl Dev Mkts [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ iShares Core S&P Small-Cap ETF [EF]		$1 - $1,000	Capital Gains, Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ iShares Core S&P Small-Cap ETF [EF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ iShares Residential and Multisector Real Estate [EF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	$201 - $1,000
Roth IRA ⇒ iShares U.S. Home Construction ETF [EF]	SP	$1,001 - $15,000	Capital Gains	$201 - $1,000	$201 - $1,000
Roth IRA ⇒ Pacer Fds Tr Us Cash Cows 100 [EF]	SP	$1,001 - $15,000	Capital Gains	$201 - $1,000	$201 - $1,000
Roth IRA ⇒ Schwab Bank Sweep [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ Vanguard FTSE Emerging Markets [EF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ Vanguard FTSE Emerging Markets [EF]		$1 - $1,000	Capital Gains, Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ Vanguard Large-Cap Index Fund ETF [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ Vanguard Large-Cap Index Fund ETF [EF]	SP	$15,001 - $50,000	Capital Gains	$201 - $1,000	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ Vanguard Mid-Cap [EF]	SP	$1,001 - $15,000	Capital Gains	$201 - $1,000	$201 - $1,000
Roth IRA ⇒ Vanguard Mid-Cap [EF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$1 - $200
Valley Strategies LLC ⇒ Valley Strategies [BA]		$1,001 - $15,000	Interest	$1 - $200	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
Valley Strategies, LLC	Policy analysis and consulting	$4,000.00	$29,500.00
Aristotle International Inc.	Spouse Salary	N/A	N/A
Butzel Long, P.C.	Spouse Salary	N/A	N/A
Ashley Barrett Law LLC	Spouse Salary	N/A	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

Position	Name of Organization
President	Valley Strategies, LLC
President	Valley Security Strategies LLC

Schedule F: Agreements

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Jimmy Greene and Associates (Saginaw, MI, US)	Research, Analysis, Strategic Advice

Schedule A Investment Vehicle Details

- IRA
- IRA (Owner: SP)
- Roth IRA (Owner: SP)
- Roth IRA
- Valley Strategies LLC
  Location: Charlotte , MI, 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: Thomas More Barrett , 05/15/2024