Filing ID #10060848

Financial Disclosure Report

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

Filer Information

Name: Kristin Lyerly
Status: Congressional Candidate
State/District: WI08

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 08/8/2024
Period Covered: 01/01/2023– 05/15/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
EdVest ⇒ Abraham's 529 [5F] Location: WI		$1,001 - $15,000	None		
EdVest ⇒ James' 529 [5F] Location: WI		$1,001 - $15,000	None		
EdVest ⇒ Julian's 529 [5F] Location: WI		$15,001 - $50,000	None		
EdVest ⇒ Lindsey's 529 [5F] Location: WI		$1,001 - $15,000	None		
Empower ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF]		$500,001 - $1,000,000	None		
Fidelity ⇒ Fidelity Cash Reserves (FDRXX) [MF]		$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity ⇒ Fidelity Low Duration Bond Factor ETF (FLDR) [EF]		$1,001 - $15,000	None		
Fidelity ⇒ Fidelity Select Semiconductors Portfolio (FSELX) [MF]		$1,001 - $15,000	None		
Fidelity ⇒ iShares Core MSCI International Developed Markets ETF (IDEV) [EF]		$15,001 - $50,000	None		
Fidelity ⇒ iShares Core S&P 500 ETF (IVV) [EF]		$100,001 - $250,000	None		
Fidelity ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		$15,001 - $50,000	None		
Fidelity ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		$15,001 - $50,000	None		
Fidelity ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		$50,001 - $100,000	None		
Fidelity ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		$15,001 - $50,000	None		
UWCU ⇒ UWCU accounts [BA] Description: business and personal checking and savings accounts		$50,001 - $100,000	None		
Vanguard ⇒ Vanguard Windsor Fund (VWNDX) [MF] Description: solo Roth 401(k)		$15,001 - $50,000	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
self employed	primarily locum tenens physician assignments	$235,384.00	$120,434.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nissan	December 2022	Auto loan	$15,001 - $50,000
	Nelnet	August 2003	student loan	$100,001 - $250,000

Schedule E: Positions

Position	Name of Organization
District: Legislative Chair, Chair Elect, Treasurer	American College of Obstetricians and Gynecologists
Board Member, Long Term Planning Chair	Wello

Schedule F: Agreements

Date	Parties To	Terms of Agreement
April 2024	the American College of Obstetricians and Gynecologists and me	leave of absence from leadership obligations during my campaign and subsequent service

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

Source (Name and Address)	Brief Description of Duties
American College of Obstetricians and Gynecologists (Washington, DC, US)	honorarium for leadership roles
Stuart & Branigin (Lafayette, IN, US)	expert witness
Visana (Minneapolis, MN, US)	medical writing

Schedule A Investment Vehicle Details

- EdVest
  Location: WI
- Empower
  Description: Target Date Fund
- Fidelity
  Description: HSA, Roth IRA, Self employed 401k, Traditional
- UWCU
  Description: Savings Accounts
- Vanguard

Description: solo Roth 401k

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: Kristin Lyerly , 08/8/2024