Filing ID #10062061

Financial Disclosure Report

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Filer Information

Name: Ms. Libbi Deann Urban
Status: Congressional Candidate
State/District: MI05

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 06/13/2024
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
Ameiprise Brokerage account ⇒ Ameriprise Money market account [BA] Description: Ameriprise Certificate account $32,320	JT	$15,001 - $50,000	Dividends, Interest	$1,001 - $2,500	$201 - $1,000
Ameriprise IRA account ⇒ BlackRock Total Return Fund Class I (MAHQX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ BNY Mellon Global Fixed Income Fund Class I (SDGIX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ BNY Mellon Research Growth Fund, Inc. Class I (DWOIX) [MF]		$50,001 - $100,000	None		
Ameriprise IRA account ⇒ Columbia Contrarian Core Fund Class I (SMGIX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ Columbia Strategic Income Fund Class I (LSIZX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒		$15,001 - $50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Advisor International Capital Appreciation Fund: Class I (FCPIX) [MF]					
Ameriprise IRA account ⇒ Fidelity Advisor Technology Fund: Class I (FATIX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ First Eagle Global Fund Class I (SGIIX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ Janus Henderson Multi-Sector Income Fund - I Shares (JMUIX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ MainStay MacKay High Yield Corporate Bond Fund, Class I (MHYIX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ PGIM Global Total Return Fund Class Z (PZTRX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ PGIM Jennison Growth Fund Class Z (PJFZX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ PGIM Total Return Bond Fund Class Z (PDBZX) [MF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ RVS STructured Solutions [FN]		$250,001 - $500,000	None		
Ameriprise IRA account ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		$15,001 - $50,000	None		
Ameriprise IRA account ⇒ Vanguard Growth ETF (VUG) [EF]		$15,001 - $50,000	None		
Ameriprise IRA, managed account, 100% Interest [OT] DESCRIPTION: Spouse's IRA account.	SP	$1,000,001 - $5,000,000	None		
Fidelity Money market account ⇒		$15,001 - $50,000	Dividends	$201 - $1,000	$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Money market [BA]					$1,000
Nueberger Berman ⇒ Neuberger Berman Small Cap Growth Fd Investor Cl (NBMIX) [MF]		$1,001 - $15,000	None		
Variable Life Insurance ⇒ Riversource Variable Life insurance [WU] Description: $38,000 in cash value, tax deferred.		None	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

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Huntington Bank	April 2023	Recreational Boat loan	$10,000 - $15,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
April 2023	Cleveland Cliffs	Retirement pension plan from former employer.

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

None disclosed.

Schedule A Investment Vehicle Details

- Ameiprise Brokerage account (Owner: JT)
  Description: Cash account
- Ameriprise IRA account
  Description: $1,013,274 in mutual funds and a managed account.
- Fidelity Money market account
  Description: $20,949 held in a money market account. individually owned.

- Nueberger Berman
  DESCRIPTION: $5,917 in a mutual fund, individually owned.
- Variable Life Insurance
  DESCRIPTION: $250,000 Death Benefit with $38,932 in cash value.

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: Ms. Libbi Deann Urban , 06/13/2024