



Filing ID #10068828

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Lisa McClain  
**Status:** Member  
**State/District:** MI09

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 08/13/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Credit Union One [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Hantz Group [PS]	SP	\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: Hantz Stock is not publicly traded. It pays a dividend as another form of income.					
Nationwide Indexed Universal Life [WU]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Nationwide Variable Universal Life [WU]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Charles Schwab 401K ⇒ Congress Mid Cap Growth Fd Inst Cl (IMIDX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab 401K ⇒ Zacks Dividend CIT - SEIZD1 [OT]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Schwab 391 ⇒ Charles Schwab Cash Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 391 ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Core MSCI EAFE ETF (IEFA) [EF]					
Charles Schwab 401K ⇒ Schwab 391 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$100,001 - \$250,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 391 ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	SP	\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 391 ⇒ Vanguard S&P Mid-Cap 400 ETF (IVOO) [EF]	SP	\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 391 ⇒ Vanguard S&P Small-Cap 600 ETF (VIOO) [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 391 ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ NuScale Power Corporation Class A Common Stock (SMR) [ST]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$100,001 - \$250,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ Palantir Technologies Inc. - Class A Common Stock (PLTR) [ST]	SP	\$100,001 - \$250,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ Polen Growth Fund Institutional Class (POLIX) [MF]	SP	\$100,001 - \$250,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]	SP	\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]	SP	\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 893 ⇒ Charles Schwab Cash Account [BA]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	\$250,001 - \$500,000		Tax-Deferred	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Brokerage Account 548 ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Arthur J. Gallagher & Co. Common Stock (AJG) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Baker Hughes Company - Common Stock (BKR) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Boston Scientific Corporation Common Stock (BSX) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Cintas Corporation - Common Stock (CTAS) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Ecolab Inc. Common Stock (ECL) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Eli Lilly and Company Common Stock (LLY) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Goldman Sachs Group, Inc. (GS) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Brokerage Account 548 ⇒ Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Howmet Aerospace Inc. Common Stock (HWM) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Intuit Inc. - Common Stock (INTU) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Intuitive Surgical, Inc. - Common Stock (ISRG) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Martin Marietta Materials, Inc. Common Stock (MLM) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Moody's Corporation Common Stock (MCO) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ NXP Semiconductors N.V. - Common Stock (NXPI) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ O'Reilly Automotive, Inc. - Common Stock (ORLY) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Brokerage Account 548 ⇒ Salesforce, Inc. Common Stock (CRM) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]	SP	None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ ServiceNow, Inc. Common Stock (NOW) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Sherwin-Williams Company (SHW) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Shopify Inc. - Class A Subordinate Voting Shares (SHOP) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ TJX Companies, Inc. (TJX) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 548 ⇒ Zoetis Inc. Class A Common Stock (ZTS) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 886 ⇒ Charles Schwab Cash Account [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Brokerage Account 886 ⇒	JT	\$500,001 -	Capital Gains,	\$15,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Savings Account [BA]		\$1,000,000	Dividends, Interest	\$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: All are now part of NUVEEN and Hantz Gear Mutual Funds. These accounts were previously Clearbridge Large Cap, Clearbridge Mid Cap, Victory Integrity Small Cap, Victory Integrity Small Cap and are now combined into NUVEEN and Hantz Gear.					
Charles Schwab Brokerage Account 886 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Brokerage Account 886 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Brokerage Account 886 ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Charles Schwab Brokerage Account 886 ⇒ Vanguard S&P Mid-Cap 400 ETF (VIVO) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Brokerage Account 886 ⇒ Vanguard S&P Small-Cap 600 ETF (VIOO) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Charles Schwab Brokerage Account 886 ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Prudential IRA ⇒ MFS Value Series Service Class [FN]		\$500,001 - \$1,000,000	Tax-Deferred		<input type="checkbox"/>

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab 401K ⇒ Schwab 824 ⇒ Polen Growth Fund Institutional Class (POLIX) [MF]	SP	12/04/2024	P	\$1,001 - \$15,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ Polen Growth Fund Institutional Class (POLIX) [MF]	SP	11/07/2024	P	\$100,001 - \$250,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ Polen Growth Fund Institutional Class (POLIX) [MF]	SP	10/23/2024	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 586 ⇒ Vanguard Extended Duration Treasury ETF (EDV) [EF]	SP	04/04/2024	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab 401K ⇒ Schwab 586 ⇒ Franklin U.S. Core Bond ETF (FLCB) [EF]	SP	07/03/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 586 ⇒ Franklin U.S. Core Bond ETF (FLCB) [EF]	SP	04/04/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 586 ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]	SP	01/05/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 586 ⇒ SPDR SSgA Multi Asset Real Return ETF (RLY) [EF]	SP	01/05/2024	P	\$15,001 - \$50,000	
Charles Schwab 401K ⇒ Schwab 586 ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	07/03/2024	P	\$15,001 - \$50,000	
Charles Schwab 401K ⇒ Schwab 391 ⇒ Vanguard S&P Mid-Cap 400 ETF (IVOO) [EF]	SP	11/26/2024	P	\$50,001 - \$100,000	
Charles Schwab 401K ⇒ Schwab 391 ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	SP	11/26/2024	P	\$15,001 - \$50,000	
Charles Schwab 401K ⇒ Schwab 391 ⇒ Vanguard S&P Small-Cap 600 ETF (VIOO) [EF]	SP	11/26/2024	P	\$1,001 - \$15,000	
Charles Schwab 401K ⇒ Schwab 391 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	11/26/2024	P	\$15,001 - \$50,000	
Charles Schwab 401K ⇒ Schwab 391 ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	11/26/2024	P	\$1,001 - \$15,000	
Charles Schwab 401K ⇒ Schwab 391 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	11/26/2024	P	\$100,001 - \$250,000	
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	12/26/2024	P	\$100,001 - \$250,000	
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	11/26/2024	P	\$100,001 - \$250,000	
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	10/23/2024	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	09/18/2024	P	\$50,001 - \$100,000	
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	07/09/2024	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	06/28/2024	P	\$1,001 - \$15,000	
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	05/31/2024	P	\$1,001 - \$15,000	
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	04/30/2024	P	\$1,001 - \$15,000	
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	03/28/2024	P	\$1,001 - \$15,000	
Charles Schwab 401K ⇒ Schwab 893 ⇒ Nuveen Flagship Michigan Muni Bd Fd Cl R (NMMIX) [MF]	SP	02/02/2024	P	\$100,001 - \$250,000	
Charles Schwab Brokerage Account 886 ⇒ Vanguard S&P Mid-Cap 400 ETF (IVOO) [EF]	SP	11/26/2024	P	\$50,001 - \$100,000	
Charles Schwab Brokerage Account 886 ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	SP	11/26/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 886 ⇒ Vanguard S&P Small-Cap 600 ETF (VIOO) [EF]	SP	11/26/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 886 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	11/26/2024	P	\$15,001 - \$50,000	
Charles Schwab Brokerage Account 886 ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	11/26/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 886 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	11/26/2024	P	\$100,001 - \$250,000	
Charles Schwab 401K ⇒ Zacks Dividend CIT - SEIZD1 [OT]	SP	08/15/2024	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: collective investment trust					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab 401K ⇒ Zacks Dividend CIT - SEIZD1 [OT]	SP	02/27/2024	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Zacks Dividend CIT - SEIZD1 [OT]	SP	08/16/2024	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Zacks Dividend CIT - SEIZD1 [OT]	SP	08/30/2024	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Zacks Dividend CIT - SEIZD1 [OT]	SP	09/13/2024	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Polen International CIT - SEIPGH [OT]	SP	06/04/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Polen International CIT - SEIPGH [OT]	SP	02/27/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Franklin Small Cap Value GG Trust CIT Class R - WFSAAAX [OT]	SP	08/15/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Franklin Small Cap Value GG Trust CIT Class R - WFSAAAX [OT]	SP	06/04/2024	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Schwab Small-Cap Index Fund-Select Shares (SWSSX) [MF]	SP	08/15/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Schwab Small-Cap Index Fund-Select Shares (SWSSX) [MF]	SP	06/04/2024	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: collective investment trust					
Charles Schwab 401K ⇒ Schwab 824 ⇒ NuScale Power Corporation Class A Common Stock (SMR) [ST]	SP	11/08/2024	P	\$1,001 - \$15,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]	SP	11/08/2024	P	\$15,001 - \$50,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ Palantir Technologies Inc. - Class A Common Stock (PLTR) [ST]	SP	11/07/2024	P	\$100,001 - \$250,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]	SP	11/07/2024	P	\$100,001 - \$250,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	11/07/2024	P	\$100,001 - \$250,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	10/23/2024	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	10/23/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ Palantir Technologies Inc. - Class A Common Stock (PLTR) [ST]	SP	10/23/2024	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]	SP	10/23/2024	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Charles Schwab 401K ⇒ Schwab 824 ⇒ Palantir Technologies Inc. - Class A Common Stock (PLTR) [ST]	SP	08/14/2024	P	\$15,001 - \$50,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ Palantir Technologies Inc. - Class A Common Stock (PLTR) [ST]	SP	06/06/2024	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab 401K ⇒ Schwab 824 ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]	SP	06/06/2024	P	\$15,001 - \$50,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	06/06/2024	P	\$1,001 - \$15,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	06/06/2024	P	\$50,001 - \$100,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]	SP	03/11/2024	P	\$15,001 - \$50,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	03/11/2024	P	\$15,001 - \$50,000	
Charles Schwab 401K ⇒ Schwab 824 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	03/11/2024	P	\$15,001 - \$50,000	
Charles Schwab Brokerage Account 548 ⇒ Visa Inc. (V) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Sherwin-Williams Company (SHW) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ O'Reilly Automotive, Inc. - Common Stock (ORLY) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Moody's Corporation Common Stock (MCO) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Martin Marietta Materials, Inc. Common Stock (MLM) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab Brokerage Account 548 ⇒ Howmet Aerospace Inc. Common Stock (HWM) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Goldman Sachs Group, Inc. (GS) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Zoetis Inc. Class A Common Stock (ZTS) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ TJX Companies, Inc. (TJX) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Shopify Inc. - Class A Subordinate Voting Shares (SHOP) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ ServiceNow, Inc. Common Stock (NOW) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Salesforce, Inc. Common Stock (CRM) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab Brokerage Account 548 ⇒ NXP Semiconductors N.V. - Common Stock (NXPI) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Intuitive Surgical, Inc. - Common Stock (ISRG) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Intuit Inc. - Common Stock (INTU) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Home Depot, Inc. (HD) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Arthur J. Gallagher & Co. Common Stock (AJG) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Eli Lilly and Company Common Stock (LLY) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Ecolab Inc. Common Stock (ECL) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Cintas Corporation - Common Stock (CTAS) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Boston Scientific Corporation Common Stock (BSX) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Baker Hughes Company - Common Stock (BKR) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab Brokerage Account 548 ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 548 ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	12/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 924 ⇒ WYOMING MICH PUB SCH GO 4% 05/01/2035 CALLABLE [GS]	SP	06/06/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Brokerage Account 924 ⇒ Sealed Air Corporation Common Stock (SEE) [ST]	SP	06/11/2024	P	\$1,001 - \$15,000	
Charles Schwab Brokerage Account 924 ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]	SP	06/10/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

\* 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
Hantz Financial Services	Spouse Salary	N/A
Hantz Group	Spouse Profit Sharing	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Credit Union One	November 2021	Home Equity Loan	\$50,001 - \$100,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Republican Main Street Partnership	03/22/2024	03/28/2024	Washington, DC - Rome, Italy - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Detroit Chamber of Commerce	05/28/2024	05/30/2024	Washington, DC - Mackinac Island, MI - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Charles Schwab 401K (Owner: SP)
- Charles Schwab Brokerage Account 886 (Owner: SP)  
LOCATION: US
- Charles Schwab Brokerage Account 548 (Owner: SP)
- Prudential IRA
- Charles Schwab Brokerage Account 924 (Owner: SP)  
DESCRIPTION: Three accounts were consolidated into this account in 2025.
- Charles Schwab 401K ⇒ Schwab 824 (Owner: SP)
- Charles Schwab 401K ⇒ Schwab 893 (Owner: SP)
- Charles Schwab 401K ⇒ Schwab 391 (Owner: SP)
- Charles Schwab 401K ⇒ Schwab 586 (Owner: SP)

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Yes  No

**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:** Hon. Lisa McClain , 08/13/2025