



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Steven Burt
Status: Congressional Candidate
State/District: UT04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 02/05/2026
Period Covered: 01/01/2025– 01/07/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Cash Reserves (FDRXX) [MF]	JT	\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Zions Bank Checking [BA]	JT	\$15,001 - \$50,000	None		
Zions Bank Checking [BA]	JT	\$1,001 - \$15,000	None		
Zions Bank Checking [BA]	DC	\$1,001 - \$15,000	None		
Centered Financial- Cash Reserve ⇒ Bank Hapoalim [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
Centered Financial- Cash Reserve ⇒ CIBC Bank [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
Centered Financial- Cash Reserve ⇒ State Street Bank and Trust C [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
Centered Financial- Cash Reserve ⇒ Truist Bank [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Centered Financial- Cash Reserve ⇒ Webster Bank [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	Not Applicable
Centered Financial- Cash Reserve ⇒ Wells Fargo Bank, N.A. [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
Centered Financial Steven Burt- Roth IRA ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Roth IRA ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Roth IRA ⇒ JPMorgan International Research Enhanced Equity ETF (JIRE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Roth IRA ⇒ JPMorgan U.S. Quality Factor ETF (JQUA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ Fidelity Government Cash Reserves [BA]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Centered Financial Steven Burt- SEP IRA ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ iShares U.S. Treasury Bond ETF (GOVT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ JPMorgan International Research Enhanced Equity ETF (JIRE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ JPMorgan U.S. Quality Factor ETF (JQUA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ State Street SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Traditional IRA ⇒ JPMorgan International Research Enhanced Equity ETF (JIRE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
my529 Plan- Maxwell Burt ⇒ Target Enrollment 2028/2029 UTAGX [5F] LOCATION: UT	SP	\$50,001 - \$100,000	Tax-Deferred		
my529 Plan- Samuel ⇒ Target Enrollment 2026/2027 UTAEX [5F] LOCATION: UT	SP	\$50,001 - \$100,000	Tax-Deferred		
Univ Utah 401a ⇒ Vanguard Target 2045 [OT] DESCRIPTION: Blended Investment- Vanguard Target 2045	SP	\$100,001 - \$250,000	Tax-Deferred		
Univ Utah 403b ⇒ Vanguard Target Ret 2045 [OT] DESCRIPTION: Blended Investment- Vanguard Target Ret 2045	SP	\$100,001 - \$250,000	Tax-Deferred		

* 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
Posigen PBC	W-2 Income	\$372,895.75	\$383,645.84
University of Utah	W-2 Income Spouse	\$159,437.00	\$144,039.00
Ballard Spahr LLP	W-2 Income	\$96,794.92	N/A
Ballard Spahr LLP	Independent Contractor Services	N/A	\$12,524.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	NelNet	2014	Student Loans	\$100,001 - \$250,000
JT	American Express	2024	Credit Card Debt	\$50,001 - \$100,000
JT	Bank of America	2025	Credit Card Debt	\$15,001 - \$50,000
JT	US Bank	2020	Trailer Loan	\$15,001 - \$50,000
	American Express	2023	Credit Card Debt	\$15,001 - \$50,000
	US Dept of Education	2006	Student Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board	Special Olympics of Utah

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Centered Financial- Cash Reserve (Owner: JT)
- Centered Financial Steven Burt- Traditional IRA
- Centered Financial Steven Burt- SEP IRA
- Centered Financial Steven Burt- Roth IRA
- Univ Utah 401a (Owner: SP)
- Univ Utah 403b (Owner: SP)
- my529 Plan- Maxwell Burt (Owner: SP)
LOCATION: UT
- my529 Plan- Samuel (Owner: SP)
LOCATION: UT

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: Steven Burt , 02/05/2026