



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ben McAdams  
**Status:** Congressional Candidate  
**State/District:** UT01

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 03/14/2026  
**Period Covered:** 01/01/2025– 02/12/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Common Ground Institute LLC, 100% Interest [OL]  LOCATION: Salt Lake City, UT, US DESCRIPTION: Consulting services COMMENTS: Distribution to candidate was less than \$200k.	JT	\$100,001 - \$250,000	Member distributions	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Fibernet MercuryDelta [PS]  DESCRIPTION: Fibernet MercuryDelta, LLC Units		\$1,001 - \$15,000	None		
Grix Onboard SPV I, LLC [HE]	JT	\$1,001 - \$15,000	None		
Grix Pecora SPV I, LLC [HE]	JT	\$15,001 - \$50,000	None		
Grix VC Fund I, LP [HE]	JT	\$15,001 - \$50,000	None		
Grix VC Fund II, LP [HE]	JT	\$1,001 - \$15,000	None		
Mercury Bank [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Mountain America Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Mountain America Money Market [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Paren Inc. [PS] DESCRIPTION: Paren Inc. – Common Stock		\$1,001 - \$15,000	None		
Propvizer Inc., 100% Interest [OL] LOCATION: Salt Lake City, UT, US DESCRIPTION: Consulting services business	JT	\$15,001 - \$50,000	Dividends	\$15,001 - \$50,000	None
SLC Rental Property [RP] LOCATION: Salt Lake City, UT, US	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
Sofi Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	None
Sofi Bank Money Market [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
USAA Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Education Savings ⇒ Fidelity I529 ⇒ NH Fidelity 500 Index [5F] LOCATION: UT DESCRIPTION: Education savings	JT	\$1,001 - \$15,000	None		
Education Savings ⇒ Fidelity I529 ⇒ NH Total Market Index Fund [5F] LOCATION: UT DESCRIPTION: Education Savings Account	JT	\$1,001 - \$15,000	None		
Education Savings ⇒ Fidelity R529 ⇒ NH Fidelity 500 Index [5F] LOCATION: UT DESCRIPTION: Education savings	JT	\$1,001 - \$15,000	None		
Education Savings ⇒ Fidelity R529 ⇒ NH Total Market Index Fund [5F] LOCATION: UT DESCRIPTION: Education Savings Account	JT	\$1,001 - \$15,000	None		
Fidelity ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	None

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Fidelity ⇒ ASSOCIATED BK NATL ASSN CD [BA] DESCRIPTION: Brokered CD	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1 - \$200
Fidelity ⇒ AST SpaceMobile, Inc. - Class A Common Stock (ASTS) [ST]	JT	\$1 - \$1,000	None		
Fidelity ⇒ Astronics Corporation - Common Stock (ATRO) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fidelity ⇒ BANKERS BK MADISON WIS CD [BA] DESCRIPTION: Brokered CD	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Fidelity ⇒ BEAL BK USA LAS VEGAS NEV CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	None
Fidelity ⇒ BEAL BK USA LAS VEGAS NEV CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒ Bitcoin [CT]	JT	\$1,001 - \$15,000	None		
Fidelity ⇒ Bitcoin ProFund - Investor Class (BTCFX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	\$2,501 - \$5,000
Fidelity ⇒ Credo Technology Group Holding Ltd - Ordinary Shares (CRDO) [ST]	JT	\$1,001 - \$15,000	None		
Fidelity ⇒ Eli Lilly and Company Common Stock (LLY) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fidelity ⇒ Fidelity Government Money Market (SPAXX) [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Fidelity ⇒ Fidelity International Index Fund (FSPSX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity ⇒ Fidelity International Index Fund (FZILX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Fidelity ⇒ Fidelity Total Market Index Fund (FZROX) [MF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Fidelity ⇒ Fidelity ZERO Extended Market Index Fund (FZIPX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity ⇒ FIRST NATL BK AMER EAST LANS CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒ GOLDMAN SACHS BK USA CD [BA] DESCRIPTION: Brokered CD	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Fidelity ⇒ GUARANTY BK SPRINGFIELD MO CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒ IonQ, Inc. Common Stock (IONQ) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fidelity ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fidelity ⇒ Moderna, Inc. - Common Stock (MRNA) [ST]	JT	\$1,001 - \$15,000	None		
Fidelity ⇒ MORGAN STANLEY BK N A CD [BA] DESCRIPTION: Brokered CD	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒ MORGAN STANLEY PRIVATE BK NATL CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Fidelity ⇒ Oracle Corporation Common Stock (ORCL) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity ⇒ Palladyne AI Corp. - Common stock (PDYN) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity ⇒ Penguin Solutions, Inc. - Common Stock (PENG) [ST]	JT	\$1,001 - \$15,000	None		
Fidelity ⇒ Phio Pharmaceuticals Corp. - Common Stock (PHIO) [ST]	JT	\$1 - \$1,000	None		
Fidelity ⇒ PROGROWTH BANK CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒ Quantum Computing Inc. - Common Stock (QUBT) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity ⇒ SAFRA NATL BANK NEW YORK NY CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒ Salesforce, Inc. Common Stock (CRM) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity ⇒ SALLIE MAE BK MURRAY UTAH CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒ SOUTH STORY BK &TR SLATER IWO CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒ STEARNS BK NA ST CLOUD MINN CD [BA]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Fidelity ⇒ TRIAD BK FRONTENAC MO CD [BA] DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity ⇒	JT	\$1,001 - \$15,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Ultragenyx Pharmaceutical Inc. - Common Stock (RARE) [ST]					
Fidelity ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]	JT	\$1,001 - \$15,000	None		
Fidelity ⇒ WELLS FARGO BANK NATL ASSN CD [BA]  DESCRIPTION: Brokered CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Retirement ⇒ Thrift Savings Plan – C Fund, 100% Interest [OT]  DESCRIPTION: Federal TSP Savings Account		\$15,001 - \$50,000	None		
Retirement ⇒ Thrift Savings Plan – I Fund, 100% Interest [OT]  DESCRIPTION: Federal TSP Savings Account		\$50,001 - \$100,000	None		
Retirement ⇒ Thrift Savings Plan – L 2040, 100% Interest [OT]  DESCRIPTION: Federal TSP Savings Account		\$100,001 - \$250,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ American Century Small Cap Growth Fund R6 Cl (ANODX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ American Century Small Cap Growth Fund R6 Cl (ANODX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ American Century Small Cap Growth Fund R6 Cl (ANODX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$250,001 - \$500,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Emerging Markets Fund Class S (REMSX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒	SP	\$50,001 -	None		

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Fidelity 500 Index Fund (FXAIX) [MF]		\$100,000			
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Global ex U.S. Index Fund (FSGGX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Global ex U.S. Index Fund (FSGGX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Global ex U.S. Index Fund (FSGGX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Inflation-Protected Bond Index Fund (FIPDX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Inflation-Protected Bond Index Fund (FIPDX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Inflation-Protected Bond Index Fund (FIPDX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Real Estate Index Fund (FSRNX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Real Estate Index Fund (FSRNX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Real Estate Index Fund (FSRNX) [MF]	SP	\$1,001 - \$15,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Total Bond K6 Fund (FTKFX) [MF]	SP	\$1,001 - \$15,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Total Bond K6 Fund (FTKFX) [MF]	SP	\$1,001 - \$15,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Total Bond K6 Fund (FTKFX) [MF]	SP	\$15,001 - \$50,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity Total Market Index Fund (FZROX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity U.S. Bond Index Fund (FXNAX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity U.S. Bond Index Fund (FXNAX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Fidelity U.S. Bond Index Fund (FXNAX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Global Equity Fund Class S (RGESX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Global Infrastructure Fund Class S (RGISX) [MF]	SP	\$1,001 - \$15,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Global Real Estate Securities Fund Class S (RRESX) [MF]	SP	\$1,001 - \$15,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ International Developed Markets Fund Class S (RINTX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Invesco Capital Appreciation Fund Class A (OPTFX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ IonQ, Inc. Common Stock (IONQ) [ST]	SP	\$1 - \$1,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ iShares Core S&P 500 ETF Option Class A (IOVAX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Multi-Asset Strategy Fund Class S (RMGSX) [MF]	SP	\$1,001 - \$15,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒	SP	\$1,001 - \$15,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Opportunistic Credit Fund Class S (RGCSX) [MF]					
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Strategic Bond Fund Class S (RFCTX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ U.S. Small Cap Equity Fund Class S (RLESX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ U.S. Strategic Equity Fund Class S (RSESX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]	SP	\$100,001 - \$250,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Vanguard Target Retirement 2040 Fund – University of Utah 401(a), 100% Interest [OT] DESCRIPTION: U Retirement Savings 401A	SP	\$100,001 - \$250,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Vanguard Target Retirement 2040 Fund – University of Utah 457B, 100% Interest [OT] DESCRIPTION: U Retirement Savings Acct 457B	SP	\$100,001 - \$250,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Vanguard Target Retirement 2045 Fund (VTIVX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Vanguard Target Retirement 2045 Fund – University of Utah 401(a), 100% Interest [OT] DESCRIPTION: U Retirement Savings 401A	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Vanguard Target Retirement 2045 Fund – University of Utah 457B, 100% Interest [OT] DESCRIPTION: U 457B Retirement Savings Vanguard	SP	\$15,001 - \$50,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Vanguard Windsor II Fund Admiral Shares (VWNAX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Vanguard Windsor II Fund Admiral Shares (VWNAX) [MF]	SP	\$15,001 - \$50,000	None		

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Retirement (Spouse) ⇒ Fidelity Spouse ⇒ Vanguard Windsor II Fund Admiral Shares (VWNAX) [MF]	SP	\$50,001 - \$100,000	None		
Retirement (Spouse) ⇒ Invesco ⇒ Invesco Capital Appreciation Fund Class A (OPTFX) [MF]	SP	\$15,001 - \$50,000	None		
Retirement ⇒ Fidelity 401A ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity 403B ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$15,001 - \$50,000	None		
Retirement ⇒ Fidelity 457B ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$50,001 - \$100,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Bitcoin ProFund - Investor Class (BTCFX) [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Duolingo, Inc. - Class A Common Stock (DUOL) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Fidelity NASDAQ Composite Index (FNCMX) [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Fidelity Total Market Index Fund (FZROX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Retirement ⇒ Fidelity SEP IRA ⇒ IonQ, Inc. Common Stock (IONQ) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ Fidelity SEP IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$15,001 - \$50,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ SoFi Technologies, Inc. - Common Stock (SOFI) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ SoundHound AI, Inc. - Class A Common Stock (SOUN) [ST]		\$1 - \$1,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Twilio Inc. Class A Common Stock (TWLO) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		\$1,001 - \$15,000	None		
Retirement ⇒ Fidelity SEP IRA ⇒ Xcel Energy Inc. (XEL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Retirement ⇒ Invesco ⇒ Invesco Main Street All Cap Fund Class A (OMSOX) [MF]		\$15,001 - \$50,000	None		
Retirement ⇒ Utah Retirement Systems ⇒ Utah Retirement Systems – Bond Fund, 100% Interest [OT]  DESCRIPTION: URS Retirement Savings		\$50,001 - \$100,000	None		
Retirement ⇒ Utah Retirement Systems ⇒ Utah Retirement Systems – International Fund, 100% Interest [OT]  DESCRIPTION: URS Savings Account		\$50,001 - \$100,000	None		
Retirement ⇒ Utah Retirement Systems ⇒ Utah Retirement Systems – Large Cap Growth Fund, 100% Interest [OT]  DESCRIPTION: URS Savings Account		\$250,001 - \$500,000	None		
Retirement ⇒ Utah Retirement Systems ⇒ Utah Retirement Systems – Large Cap Value Fund, 100% Interest [OT]  DESCRIPTION: URS Retirement Savings		\$100,001 - \$250,000	None		
Retirement ⇒ Utah Retirement Systems ⇒ Utah Retirement Systems – Small Cap Fund, 100%		\$100,001 - \$250,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Interest [OT]					
DESCRIPTION: URS Savings Account					
Retirement ⇒ Utah Retirement Systems ⇒ URSDB ⇒ Utah Retirement Systems [DB]		\$100,001 - \$250,000	None		
Retirement ⇒ Utah Retirement Systems 457 Savings ⇒ Utah Retirement Systems – Bond Fund, 100% Interest [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: URS 457 Savings					
Retirement ⇒ Utah Retirement Systems 457 Savings ⇒ Utah Retirement Systems – International Fund, 100% Interest [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: URS 457 Savings					
Retirement ⇒ Utah Retirement Systems 457 Savings ⇒ Utah Retirement Systems – Large Cap Value Fund, 100% Interest [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: URS 457 Savings					
Retirement ⇒ Utah Retirement Systems 457 Savings ⇒ Utah Retirement Systems – Small Cap Fund, 100% Interest [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: URS 457 Savings					
Retirement ⇒ Utah Retirement Systems 457 Savings ⇒ Utah Retirement Systems 457 – Large Cap Growth, 100% Interest [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: URS 457 Savings					
Retirement ⇒ Vanguard ⇒ Acadian All Country World ex US Equity CIT Fund Class C (AACWIX) [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Vanguard ⇒ Vanguard Bond Index Fund Total Bond Mkt Index Fund Institutional Share (VBTIX) [MF]		\$1,001 - \$15,000	None		
Retirement ⇒ Vanguard ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF]		\$50,001 - \$100,000	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
Common Ground Institute	Salary	\$10,000.00	\$100,000.00
University of Utah	Spouse salary	N/A	N/A
Thrivent Bank	Board service	\$10,000.00	\$30,000.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	PennyMac	May 2016	Mortgage	\$100,001 - \$250,000
	Mohela	June 2003	Student loans	\$15,001 - \$50,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
CEO	Propvizer
CEO	Common Ground Institute
Nonresident Senior Fellow	The Brookings Institution
Board Member	Thrivent Bank

### 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
Thrivent Bank (Minneapolis, MN, US)	Board service
Rockefeller Philanthropy Advisors (New York, NY, US)	Policy consulting on various initiatives
Western Governors University (Millcreek, UT, US)	Education policy and community engagement
Dutko (Washington, DC, US)	Policy consulting

Source (Name and Address)	Brief Description of Duties
City of Evanston (Evanston, IL, US)	Asset strategy and consulting
Government Finance Officers Association (Chicago, IL, US)	Policy consulting
Larry H. Miller Company (Sandy, UT, US)	Policy and real estate consulting
HR&A Advisors (New York, NY, US)	Policy and real estate consulting
Friends of Japantown (Salt Lake City, UT, US)	Real estate consulting and community engagement
CH Robinson Worldwide (Minneapolis, MN, US)	Policy consulting

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Retirement
- Education Savings (Owner: JT)  
LOCATION: UT
- Retirement (Spouse) (Owner: SP)
- Fidelity (Owner: JT)
- Retirement (Spouse) ⇒ Invesco (Owner: SP)
- Retirement (Spouse) ⇒ Fidelity Spouse (Owner: SP)
- Education Savings ⇒ Fidelity R529 (Owner: JT)  
LOCATION: UT
- Education Savings ⇒ Fidelity I529 (Owner: JT)  
LOCATION: UT
- Retirement ⇒ Utah Retirement Systems
- Retirement ⇒ Utah Retirement Systems 457 Savings  
DESCRIPTION: URS 457 Savings Account
- Retirement ⇒ Vanguard
- Retirement ⇒ Fidelity 457B
- Retirement ⇒ Invesco
- Retirement ⇒ Fidelity SEP IRA
- Retirement ⇒ Utah Retirement Systems ⇒ URSDB
- Retirement ⇒ Fidelity 403B
- Retirement ⇒ Fidelity 401A

## 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:** Hon. Ben McAdams , 03/14/2026