



Filing ID #10074834

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Mike Kennedy
Status: Member
State/District: UT03

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/10/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alta CDs [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
Alta Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Cash Account - Schwab [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Kennedy Capital, LLC [OL] LOCATION: UT, UT, US DESCRIPTION: Business Consultancy (dormant)		\$1 - \$1,000	None		☐
Kennedy for US Senate [DO]		\$250,001 - \$500,000	None		☐
Mike Kennedy for Utah [DO]		\$100,001 - \$250,000	None		☐
Azova, Inc. ⇒ Azova, Inc. [PS] DESCRIPTION: Stock Holding in Azova, Inc.	SP	\$50,001 - \$100,000	Dividends	None	☐
Bank 1 ⇒		\$100,001 -	Interest	\$1 - \$200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Savings [BA]		\$250,000			☐
Bank 2 ⇒ Savings [BA]		\$1,001 - \$15,000	Interest	None	☐
Bank 3 ⇒ Savings [BA]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
Fidelity Investments ⇒ UUHC 401A ⇒ FID FRDM BLND 2035 [OT]		\$100,001 - \$250,000	Tax-Deferred		☐
DESCRIPTION: University of Utah retirement plan					
Fidelity Investments ⇒ UUHC 403b ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Investments ⇒ UUHC 403b ⇒ Fidelity Diversified International Fund Class K (FDIKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Investments ⇒ UUHC 403b ⇒ Fidelity Freedom Blend 2035 Fund Class K6 (FHJDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Investments ⇒ UUHC 457B ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Investments ⇒ UUHC 457B ⇒ Fidelity Diversified International Fund Class K (FDIKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Investments ⇒ UUHC 457B ⇒ Fidelity Freedom Blend 2035 Fund Class K6 (FHJDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
Michael Kennedy, MD, Inc. ⇒ Premier Family Medical, LLC [OL]		\$50,001 - \$100,000	Business Income	\$100,001 - \$1,000,000	☐
LOCATION: UT, UT, US					
DESCRIPTION: Ownership interest in medical practice sold to partners per March 2025 agreement.					
Schwab accounts ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Dividends, Interest	\$1 - \$200	☐
Schwab accounts ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab accounts ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$1,001 - \$15,000	None		☒
Schwab accounts ⇒ Cloudflare, Inc. Class A Common Stock (NET) [ST]		\$1,001 - \$15,000	None		☐
Schwab accounts ⇒ EA Series Trust Strive U.S. Energy ETF (DRLL) [EF]		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	☐
Schwab accounts ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$1,001 - \$15,000	None		☒
Schwab accounts ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	☐
Schwab accounts ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	☐
Schwab accounts ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		\$1,001 - \$15,000	None		☐
Schwab accounts ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	☒
State Retirement ⇒ URS Retirement Plan-401(k) Target Date 2035, 100% Interest [OT] DESCRIPTION: Utah Retirement System 401(k) invested in Target Date 2035		\$15,001 - \$50,000	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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Schwab accounts ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		05/09/2025	P	\$1,001 - \$15,000	
Schwab accounts ⇒ Vanguard S&P 500 ETF (VOO) [EF]		05/20/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Schwab accounts ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		08/01/2025	P	\$1,001 - \$15,000	
Schwab accounts ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		08/29/2025	P	\$1,001 - \$15,000	

* 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

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2025	Premier Family Medical	Divestiture agreement for medical practice over 5-year term
June 2014	Mike Kennedy and University of Utah	Retirement Account from time employed at the University of Utah
January 2013	Mike Kennedy and Utah Retirement Systems	Retirement Account from Utah state for legislative service.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

◦ Fidelity Investments ⇒ UUHC 401A ◦ Bank 1
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LOCATION: US

- Bank 3 (Owner: SP)
LOCATION: US
- Azova, Inc. (Owner: SP)
LOCATION: US
- Fidelity Investments ⇒ UUHC 457B
- Michael Kennedy, MD, Inc.
LOCATION: US
- Fidelity Investments
- Bank 2
LOCATION: US
- State Retirement
- Fidelity Investments ⇒ UUHC 403b
- Schwab accounts

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. Mike Kennedy , 08/10/2026