



Filing ID #10075421

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Haley Stevens
Status: Member
State/District: MI11

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 05/15/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fundamental Investors, Class F-2 Shares (FINFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
JPMorgan Liquid Assets Money Market Fund Capital Shares (CJLXX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
COMMENTS: This is a money market fund.					
PNC Bank Checking Account [BA]		\$1,001 - \$15,000	None		☐
PNC Bank Savings Account [BA]		\$1,001 - \$15,000	None		☐
RJ Bank Deposit Program [BA]		\$1,001 - \$15,000	None		☐
Vanguard Div Appreciation ETF (VIG) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Haley Stevens IRA ⇒ RJ Bank Deposit Program [BA]		\$1 - \$1,000	Tax-Deferred		☐
Haley Stevens IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$50,001 - \$100,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ROTH IRA ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
ROTH IRA ⇒ Fidelity Advisor New Insights Fund: Class I (FINSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
ROTH IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
ROTH IRA ⇒ RJ Bank Deposit Program [BA]		\$1 - \$1,000	Tax-Deferred		☐
ROTH IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$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?
ROTH IRA ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]		12/12/2025	P	\$1,001 - \$15,000	
ROTH IRA ⇒ Fidelity Advisor New Insights Fund: Class I (FINSX) [MF]		12/08/2025	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

Owner	Creditor	Date Incurred	Type	Amount of Liability
	M Marcotte	November 2022	Home Mortgage	\$100,001 - \$250,000
	COMMENTS: This is a loan from a family member that was not previously reported because loans from family members are not required to be disclosed.			

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Sofi	October 2023	Home Renovations	\$15,001 - \$50,000
	Rocket Mortgage	November 2021	Home Mortgage	\$250,001 - \$500,000
COMMENTS: House sold in 2025. Mortgage no longer held.				

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

- ROTH IRA
- Haley Stevens IRA

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

COMMENTS

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. Haley Stevens , 05/15/2026