



Filing ID #10076315

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Tim Walberg
Status: Member
State/District: MI05

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 05/13/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Amazon.com, Inc. - Common Stock (AMZN) [ST]	JT	\$15,001 - \$50,000	None		☒
Apple Inc. - Common Stock (AAPL) [ST]	JT	\$15,001 - \$50,000	None		☒
Bank of America Corporation Common Stock (BAC) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Boeing Company (BA) [ST]	JT	\$15,001 - \$50,000	None		☒
Caterpillar, Inc. Common Stock (CAT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Chevron Corporation Common Stock (CVX) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
CREF Global Equities R1 [FN]	JT	\$15,001 - \$50,000	Tax-Deferred		☐
CREF Growth R1 [FN]	JT	\$50,001 - \$100,000	Tax-Deferred		☐
CREF Total Global Stk R1 [FN]	JT	\$15,001 - \$50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Eaton Corporation, PLC Ordinary Shares (ETN) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Fidelity Select Defense & Aerospace (FSDAX) [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$2,501 - \$5,000	☒
First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
FS Specialty Lending Fund Common Shares of Beneficial Interest (FSSL) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
FT Vest Laddered Deep Buffer ETF (BUFD) [EF]	JT	\$15,001 - \$50,000	None		☒
Invesco NASDAQ 100 ETF (QQQM) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
Jacobs Solutions Inc. Common Stock (J) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
L3Harris Technologies, Inc. Common Stock (LHX) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Legislative Retirement System [PE]		Undetermined	pension	\$50,001 - \$100,000	☐
DESCRIPTION: State of MI legislative retirement					
Lockheed Martin Corporation Common Stock (LMT) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
MFS Growth Fund Class I (MFEIX) [MF]	JT	\$15,001 - \$50,000	None		☐
Savoy Energy, LP mineral rights/royalties [MO]	JT	Undetermined	mineral rights	None	☐
LOCATION: Traverse City, MI, US					
TIAA Real Estate [FN]	JT	\$1,001 - \$15,000	Tax-Deferred		☐
TIAA Traditional [FN]	JT	\$1,001 - \$15,000	Tax-Deferred		☐
Wells Fargo & Company Common Stock (WFC) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒

* 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?
Aristotle Short Duration Income Fund Class I-2 (PLDSX) [MF]	JT	02/07/2025	S	\$15,001 - \$50,000	☐
Aristotle Strategic Income Fund Class A (PLSTX) [MF]	JT	02/07/2025	S	\$15,001 - \$50,000	☒
Cim Real Estate Finance Trust [RE]	JT	02/07/2025	S	\$15,001 - \$50,000	☒
Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]	JT	02/07/2025	S	\$15,001 - \$50,000	☐
JPMorgan Hedged Equity 2 Fund Class I (JHQDX) [MF]	JT	02/07/2025	S	\$15,001 - \$50,000	☒
John Hancock Fds III Disciplined Value Mid Cap Fd Class I (JVMIX) [MF]	JT	02/07/2025	S	\$15,001 - \$50,000	☐
Invesco Global Infrastructure Fund Class Y (GIZYX) [MF]	JT	02/07/2025	S	\$15,001 - \$50,000	☐
Amazon.com, Inc. - Common Stock (AMZN) [ST]	JT	02/07/2025	P	\$1,001 - \$15,000	
Apple Inc. - Common Stock (AAPL) [ST]	JT	02/07/2025	P	\$15,001 - \$50,000	
Bank of America Corporation Common Stock (BAC) [ST]	JT	02/07/2025	P	\$1,001 - \$15,000	
Boeing Company (BA) [ST]	JT	02/07/2025	P	\$15,001 - \$50,000	
Caterpillar, Inc. Common Stock (CAT) [ST]	JT	02/07/2025	P	\$15,001 - \$50,000	
Chevron Corporation Common Stock (CVX) [ST]	JT	02/07/2025	P	\$15,001 - \$50,000	
Eaton Corporation, PLC Ordinary Shares (ETN) [ST]	JT	02/07/2025	P	\$15,001 - \$50,000	
Exxon Mobil Corporation Common Stock (XOM) [ST]	JT	02/07/2025	P	\$15,001 - \$50,000	
First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]	JT	02/07/2025	P	\$15,001 - \$50,000	
Invesco NASDAQ 100 ETF (QQQM) [EF]	JT	02/07/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Jacobs Solutions Inc. Common Stock (J) [ST]	JT	02/07/2025	P	\$15,001 - \$50,000	
L3Harris Technologies, Inc. Common Stock (LHX) [ST]	JT	02/07/2025	P	\$15,001 - \$50,000	
Lockheed Martin Corporation Common Stock (LMT) [ST]	JT	02/07/2025	P	\$1,001 - \$15,000	
Wells Fargo & Company Common Stock (WFC) [ST]	JT	02/07/2025	P	\$15,001 - \$50,000	
FT Vest Laddered Deep Buffer ETF (BUFD) [EF]	JT	02/07/2025	S (partial)	\$15,001 - \$50,000	☒
Fidelity Select Defense & Aerospace (FSDAX) [MF]	JT	02/07/2025	S	\$15,001 - \$50,000	☒

* 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
State of Michigan	legislative pension	\$98,158.20

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Moody Bible Institute

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
April 2005	State of Michigan	pension for service in MI House of Representatives

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.

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. Tim Walberg , 05/13/2026