



Filing ID #10075775

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: 2026
Filing Date: 08/12/2026
Period Covered: 01/01/2025– 07/14/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Centered Financial- Joint WROS ⇒ Fidelity Cash Reserves (FDRXX) [MF]	JT	\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Centered Financial Steven Burt- Roth IRA ⇒ Fidelity Advisor Total Bond [CS] DESCRIPTION: Bonds		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Roth IRA ⇒ Fidelity Emerging Markets Multifactor ETF (FDEM) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Roth IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- Roth IRA ⇒ Invesco S&P SmallCap Momentum ETF (XSMO) [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 ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]					
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 [CS]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Bonds					
Centered Financial Steven Burt- SEP IRA ⇒ Fidelity Emerging Markets Multifactor ETF (FDEM) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ Fidelity Enhanced Mid Cap Core ETF (FMDE) [EF]		\$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 ⇒ Invesco NASDAQ 100 ETF (QQQM) [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		
Centered Financial Steven Burt- SEP IRA ⇒ iShares Flexible Income Active ETF (BINC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ iShares High Yield Systematic Bond ETF (HYDB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Centered Financial Steven Burt- SEP IRA ⇒ iShares U.S. Digital Infrastructure and Real Estate ETF (IDGT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
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		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
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 ⇒ VanEck Real Assets ETF (RAAX) [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 Investment Option (UTAGX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
my529 Plan- Samuel ⇒ Target Enrollment 2024/2025 Investment Option (UTADX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Univ Utah 401a ⇒ Vanguard Target 2045, 100% Interest [OT] DESCRIPTION: Target Retirement 2025	SP	\$250,001 - \$500,000	Tax-Deferred		
Univ Utah 403b ⇒ Vanguard Target Ret 2045, 100% Interest [OT] DESCRIPTION: Retirement Target 2025	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
Ballard Spahr LLP	W-2 Income	\$204,567.00	\$96,795.00
University of Utah	W-2 Income	\$112,200.00	\$159,437.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	American Express	2014	Credit Card Debt	\$50,001 - \$100,000
JT	American Express	2023	Credit Card Debt	\$10,000 - \$15,000
JT	US Bank	2020	Trailer Loan	\$15,001 - \$50,000
JT	Zions Bank	2019	Home Equity	\$100,001 - \$250,000
JT	Bank of America	2025	Credit Card Debt	\$15,001 - \$50,000
JT	US Dept of Education	2006	Student Loans	\$10,000 - \$15,000
SP	NelNet	2014	Student Loans	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board member	Special Olympics of Utah
Counsel	Ballard Spahr

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

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

- 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 , 08/12/2026