



Filing ID #10076677

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Sarah Trone Garriott  
**Status:** Congressional Candidate  
**State/District:** IA03

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2026  
**Filing Date:** 08/13/2026  
**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 |
|-----------------------------------------------------------------------------------|-------|---------------------|----------------|-------------------------------|-----------------------|
| Green State Credit Union Checking Account [BA]                                    | JT    | \$15,001 - \$50,000 | Interest       | \$1 - \$200                   | \$201 - \$1,000       |
| Green State Credit Union Savings Account [BA]                                     | JT    | \$1,001 - \$15,000  | Interest       | \$1 - \$200                   | \$1 - \$200           |
| Equi-Vest Variable Annuity Series ⇒<br>1290 VT Socially Responsible [FN]          |       | \$1 - \$1,000       | Tax-Deferred   |                               |                       |
| Equi-Vest Variable Annuity Series ⇒<br>EQ/Equity 500 Index Portfolio EQE5UUS [FN] |       | \$1 - \$1,000       | Tax-Deferred   |                               |                       |
| Equi-Vest Variable Annuity Series ⇒<br>EQ/Large Cap Growth Index [FN]             |       | \$1 - \$1,000       | Tax-Deferred   |                               |                       |
| Inspira Rollover Traditional IRA ⇒<br>Cash [IH]                                   |       | \$1,001 - \$15,000  | Interest       | \$1 - \$200                   | \$1 - \$200           |
| IPERS (State of Iowa Retirement Account) ⇒<br>State of Iowa Pension Plan [PE]     |       | \$15,001 - \$50,000 | None           |                               |                       |
| Portico ELCA 403(b) ⇒                                                             |       | \$250,001 -         | Tax-Deferred   |                               |                       |

| Asset                                                                                                              | Owner | Value of Asset        | Income Type(s) | Income<br>Current Year<br>to Filing | Income<br>Preceding<br>Year |
|--------------------------------------------------------------------------------------------------------------------|-------|-----------------------|----------------|-------------------------------------|-----------------------------|
| Portico Retirement 2045 Social Purpose Fund [OT]                                                                   |       | \$500,000             |                |                                     |                             |
| DESCRIPTION: Portico Retirement 2045 Social Purpose Fund — Qualified EIF                                           |       |                       |                |                                     |                             |
| TIAA ⇒ Drake University Mandatory Tax Deferred Annuity Retirement Plan ⇒ Nuveen Lifecycle Index 2040 R6 TLZIX [FN] | SP    | \$100,001 - \$250,000 | Tax-Deferred   |                                     |                             |
| TIAA ⇒ Drake University Voluntary Tax Deferred Annuity Retirement Plan ⇒ Nuveen Lifecycle Index 2040 R6 TLZIX [FN] | SP    | \$1,001 - \$15,000    | Tax-Deferred   |                                     |                             |
| TIAA ⇒ James Madison University Cash Match Plan ⇒ CREF Social Choice R3 QCSCIX [FN]                                | SP    | \$1,001 - \$15,000    | Tax-Deferred   |                                     |                             |
| TIAA ⇒ James Madison University Tax Deferred Annuity Plan ⇒ Nuveen Lifecycle 2040 rtm TCLOX [FN]                   | SP    | \$15,001 - \$50,000   | Tax-Deferred   |                                     |                             |
| Virginia Retirement System Plan 2 ⇒ Virginia Retirement System Plan 2 [DB]                                         | SP    | \$15,001 - \$50,000   | 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<br>Current Year to<br>Filing | Amount<br>Preceding Year |
|-----------------------------------|---------------------------------|-------------------------------------|--------------------------|
| Des Moines Area Religious Council | Salary & Clergy Housing Stipend | N/A                                 | \$39,079.59              |
| State of Iowa                     | Salary & Per Diem               | \$37,106.10                         | \$43,845.00              |
| Sarah for Iowa                    | Candidate Salary                | \$16,692.44                         | N/A                      |
| Drake Uiversity                   | Spouse Salary                   | N/A                                 | N/A                      |

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

| Position          | Name of Organization                        |
|-------------------|---------------------------------------------|
| State Senator     | State of Iowa                               |
| Ordained Minister | ELCA                                        |
| Board Member      | Des Moines Children's Museum Campaign Board |

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Equi-Vest Variable Annuity Series
- TIAA ⇒ Drake University Mandatory Tax Deferred Annuity Retirement Plan (Owner: SP)
- Virginia Retirement System Plan 2 (Owner: SP)
- Inspira Rollover Traditional IRA
- IPERS (State of Iowa Retirement Account)  
DESCRIPTION: State Pension
- TIAA ⇒ James Madison University Cash Match Plan (Owner: SP)
- TIAA (Owner: SP)
- TIAA ⇒ Drake University Voluntary Tax Deferred Annuity Retirement Plan (Owner: SP)
- Portico ELCA 403(b)
- TIAA ⇒ James Madison University Tax Deferred Annuity Plan (Owner: SP)

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:** Sarah Trone Garriott , 08/13/2026