Filing ID #10079980

Financial Disclosure Report

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Filer Information

Name: Mark Christopher Scheffler
Status: Congressional Candidate
State/District: WI08

Filing Information

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 06/09/2026
Period Covered: 01/01/2025– 04/15/2026

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Appleton Group LLC ⇒ Appleton Group LLC, 37% Interest [OL]		$500,001 - $1,000,000	Capital Gains	$100,001 - $1,000,000	$100,001 - $1,000,000
Location: Appleton/Outagamie, WI, US Description: Multiple-member LLC; financial planning firm; sold to Johnson Financial Group (2023); residual payout;					
Brokerage Account Flex ⇒ Charles Schwab Bank MMKT [BA]		$15,001 - $50,000	Interest	$1 - $200	$1 - $200
Brokerage Account Flex ⇒ Schwab Treasury Oblig MMKT [BA]		$250,001 - $500,000	Dividends	$2,501 - $5,000	$5,001 - $15,000
Brokerage Account Flex ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		$100,001 - $250,000	Dividends	$201 - $1,000	$1,001 - $2,500
Brokerage Account Flex ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]		$100,001 - $250,000	Dividends	$1 - $200	$201 - $1,000
Brokerage Account STATIC ⇒ Charles Schwab Bank [BA]		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Brokerage Account STATIC ⇒		$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares MBS ETF (MBB) [EF]					
Brokerage Account STATIC ⇒ JPMorgan Core Plus Bond ETF (JCPB) [EF]		$50,001 - $100,000	Dividends	$1,001 - $2,500	$2,501 - $5,000
Brokerage Account STATIC ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		$50,001 - $100,000	Dividends	$201 - $1,000	$1,001 - $2,500
Brokerage Account STATIC ⇒ Schwab International Equity ETF (SCHF) [EF]		$50,001 - $100,000	Dividends	$201 - $1,000	$1,001 - $2,500
Brokerage Account STATIC ⇒ Schwab Treasury Obligation MMKT [BA]		$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
Brokerage Account STATIC ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		$50,001 - $100,000	Dividends	$201 - $1,000	$201 - $1,000
Brokerage Account STATIC ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]		$50,001 - $100,000	Dividends	$1 - $200	$201 - $1,000
Brokerage Account STATIC ⇒ Schwab U.S. Mid Cap ETF (SCHM) [EF]		$50,001 - $100,000	Dividends	$1 - $200	$201 - $1,000
Brokerage Account STATIC ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		$50,001 - $100,000	Dividends	$1,001 - $2,500	$1,001 - $2,500
Checking Account ⇒ Nicolet National Bank Checking [BA]		$1,001 - $15,000	None		
IRA ⇒ Charles Schwab Bank [BA]		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
IRA ⇒ Schwab Treasury Obligation MMKT [BA]		$250,001 - $500,000	Dividends	$2,501 - $5,000	$5,001 - $15,000
IRA ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		$50,001 - $100,000	Dividends	$201 - $1,000	$201 - $1,000
IRA ⇒ Schwab U.S. Large-Cap Growth ETF		$50,001 - $100,000	Dividends	$1 - $200	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(SCHG) [EF]					
Primary Residence ⇒ Primary Residence [RP] LOCATION: Appleton/Outagamie, WI, US		$250,001 - $500,000	Rent	$2,501 - $5,000	$5,001 - $15,000
Roth IRA ⇒ Charles Schwab Bank MMKT [BA]		$1 - $1,000	Interest	$1 - $200	$1 - $200
Roth IRA ⇒ Charles Schwab Treasury Obligations MMKT [BA]		$15,001 - $50,000	Dividends	$201 - $1,000	$1,001 - $2,500
Roth IRA ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		$15,001 - $50,000	Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]		$15,001 - $50,000	Dividends	$1 - $200	$1 - $200

* 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
	Nicolet National Bank	December 2020	Mortgage on primary residence	$100,001 - $250,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

Source (Name and Address)	Brief Description of Duties
Johnson Financial Group (Racine, WI, US)	Investment Advisory (Employee)

Schedule A Investment Vehicle Details

- Brokerage Account STATIC
  Description: Charles Schwab Brokerage Account STATIC
- IRA
  Description: Charles Schwab IRA
- Roth IRA
  Description: Charles Schwab Roth IRA
- Checking Account
  Location: US
  Description: Nicolet National Bank Checking
- Brokerage Account Flex
  Description: Charles Schwab Brokerage Account FLEX
- Appleton Group LLC (37% Interest)
  Location: Appleton, WI, US
- Primary Residence (100% Interest)
  Location: Appleton, WI, US

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: Mark Christopher Scheffler , 06/09/2026