



2025

Employment/ Earned
Income Entry for
Filer

Type of Earned Income
Optional
Wages

Source of Earned Income
during reporting period
Optional
Employer

Name of Employer/ Earned
Income Source
State of Michigan

Occupation
Optional
Elected Official

Positions Held with
Employer(s)
Governor

Total income from the
source during reporting
period
Optional
155045.62

Address of Employment/Earned Income Source

Employment/ Earned
Income Source Street 1
DTMB Office of Financial Management

Employment/ Earned
Income Source Street 2
Optional

Employment/ Earned
Income Source City
Lansing

Employment/ Earned
Income Source State
Michigan

Employment/ Earned
Income Source Zip
48909

Country
Optional
United States

Did Filer/Spouse leave this place of employment

Optional

No

Additional information for disclosure and clarity

Optional

Wages equals social security wages

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2025

Organization Information

Organization Type

Optional

Corporation

Title of Position

Other

Describe Other Title of Position

Member

Do you have an ownership interest?

Optional

Yes

Additional Notes for Clarity

Optional

This LLC is for the Governor's family office to manage her personal affairs.

Organization Information

Organization Name

Super Deluxe, LLC

Street 1

Optional

500 Woodward Ave.

Street 2

Optional

Suite 3500

City

Optional

Detroit

State

Optional

Michigan

Zip

Optional

48226

Country

Optional

United States

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2025

Organization Information

Organization Type

Optional
Corporation

Title of Position

Other

Describe Other Title of Position

Member

Do you have an ownership interest?

Optional
Yes

Additional Notes for Clarity

Optional
real property

Organization Information

Organization Name

Novus Mundus, LLC

Street 1

Optional
220 Park St.

Street 2

Optional
Suite 200

City

Optional
Birmingham

State

Optional
Michigan

Zip

Optional
48009

Country

Optional
United States

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2025

Asset Information

NOTE: The list of asset types are potential investment or income-producing entities that are included to aid in the reporting of assets but does not require a filer to select all of the items in the list. A filer is required to disclose one or more of the listed assets only if the filer determines one of those items (or any other item) is not a business asset, is “held for investment or production of income” and has a value of \$1,000 or more during the reporting period pursuant to MCL 15.707(1)(g) and MCL 169.307(1)(g).

Asset Type

Cash (Liquid) Assets (Checking/Savings, Cash, cash equivalents)

Description of Asset

Optional
Held within IRA managed by Cerity Partners.

Fair Market Value

Optional
1133.41

Additional Information for Disclosure and Clarity

Optional

Asset City

Optional

Asset State

Optional
Michigan

Country

Optional
United States

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Show

S

Show

2025

Asset Information

NOTE: The list of asset types are potential investment or income-producing entities that are included to aid in the reporting of assets but does not require a filer to select all of the items in the list. A filer is required to disclose one or more of the listed assets only if the filer determines one of those items (or any other item) is not a business asset, is "held for investment or production of income" and has a value of \$1,000 or more during the reporting period pursuant to MCL 15.707(1)(g) and MCL 169.307(1)(g).

Asset Type

Cash (Liquid) Assets (Checking/Savings, Cash, cash equivalents)

Description of Asset

Optional
Held within Trust managed by Cerity Partners.

Fair Market Value

Optional
27326.33

Additional Information for Disclosure and Clarity

Optional

Asset City

Optional

Asset State

Optional
Michigan

Country

Optional
United States

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2025

Property Information

Property Type

Residential

Property Description

Optional

House

Type of Interest

Optional

Ownership - Full

State Equalized Value of
Real Property at End of
Reporting Period

Optional

312400.00

Additional Notes for Clarity

Optional

Cottage

Property Address

Street (Excluding Street
Number)

Optional

City

Elk Rapids

State

Michigan

Zip

49629

Country

Optional

United States

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2025

Property Information

Property Type

Other (describe)

Other Property Type

vacant land

Property Description

Optional
Land

Type of Interest

Optional
Ownership - Full

State Equalized Value of
Real Property at End of
Reporting Period

Optional
78200.00

Additional Notes for Clarity

Optional
Owned by Novus Mundus, LLC

Property Address

Street (Excluding Street
Number)

Optional

City

Ada

State

Michigan

Zip
49301

Country
Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
67241.42

Additional Notes for Clarity

Optional
Held within Trust, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

Harding Loevner International Equity Portfolio Institutional Class

Description

Optional
HLMIX

Street 1

Optional
400 Crossing Boulevard

Street 2

Optional

City

Bridgewater

State

New Jersey

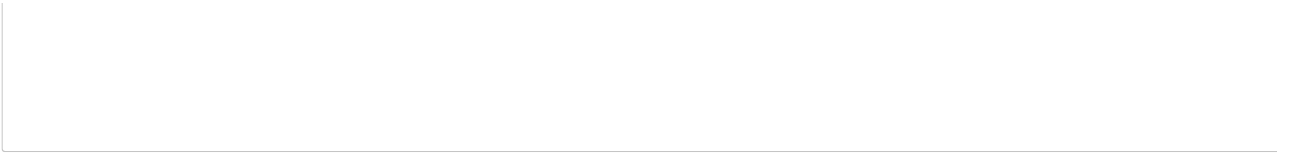
Zip

08807

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
218140.61

Additional Notes for Clarity

Optional
Held within Trust, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

Vanguard Intermediate-Term Tax-Exempt Fund Admiral Shares

Description

Optional
VWIUX

Street 1

Optional
P.O. Box 2600

Street 2

Optional

City

Valley Forge

State

Pennsylvania

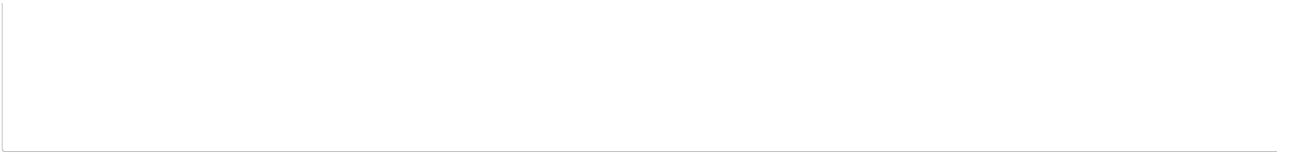
Zip

19482

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
1220095.66

Additional Notes for Clarity

Optional
Held within Trust, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

Vanguard Total Stock Market Index Fund Admiral Shares

Description

Optional
VTSAX

Street 1

Optional
P.O. Box 2600

Street 2

Optional

City

Valley Forge

State

Pennsylvania

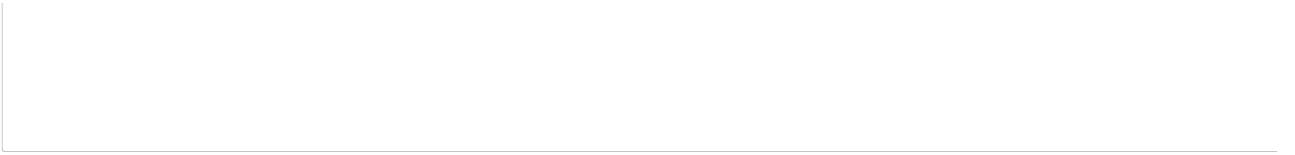
Zip

19482

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
59612.19

Additional Notes for Clarity

Optional
Held within Trust, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

AMG GW&K Small/Mid Cap Core Fund - Class I

Description

Optional
GWGIX

Street 1

Optional
600 Steamboat Rd

Street 2

Optional
300

City

Greenwich

State

Connecticut

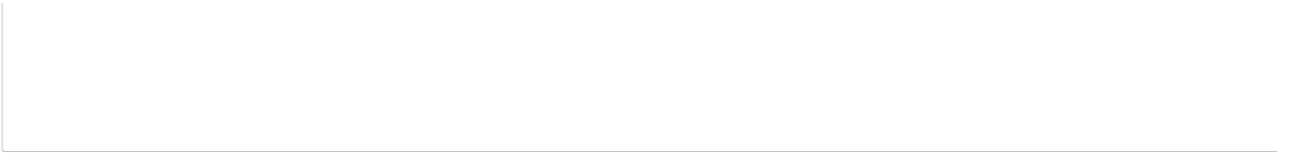
Zip

06830

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
78626.85

Additional Notes for Clarity

Optional
Held within IRA, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

Harbor Large Cap Value Fund Retirement Class

Description

Optional
HNLVX

Street 1

Optional
111 South Wacker Drive

Street 2

Optional
34th Floor

City

Chicago

State

Illinois

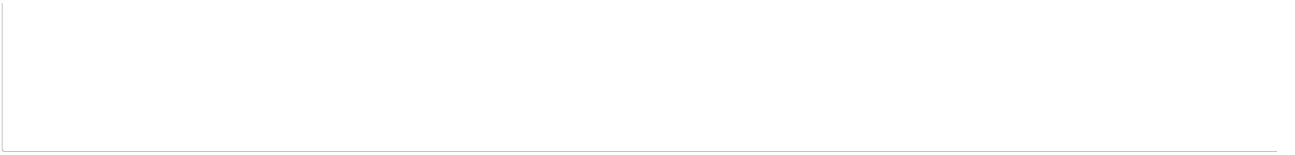
Zip

60606

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
95105.01

Additional Notes for Clarity

Optional
Held within IRA, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

AMG GW&K Small/Mid Cap Core Fund - Class I

Description

Optional
GWGIX

Street 1

Optional
600 Steamboat Rd

Street 2

Optional
300

City

Greenwich

State

Connecticut

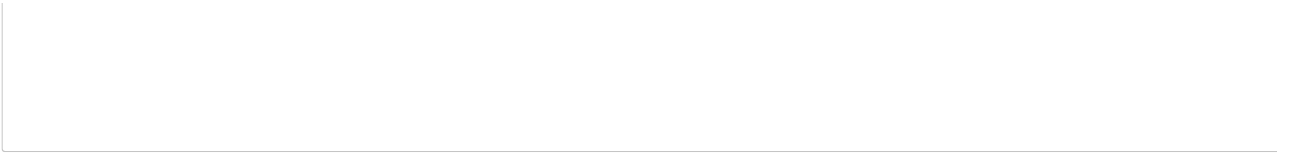
Zip

06830

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
225987.43

Additional Notes for Clarity

Optional
Held within IRA, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

Vanguard Intermediate-Term Bond Index Fund Admiral Shares

Description

Optional
VBILX

Street 1

Optional
100 Vanguard Blvd.

Street 2

Optional

City

Malvern

State

Pennsylvania

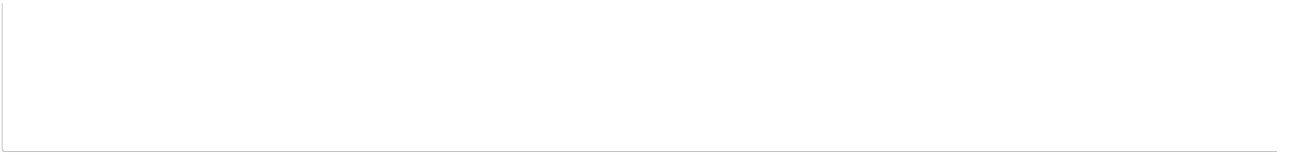
Zip

19355

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
188171.52

Additional Notes for Clarity

Optional
Held within IRA, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

T. Rowe Price Spectrum Income Fund I Class

Description

Optional
TSPNX

Street 1

Optional
P.O. Box 1600

Street 2

Optional

City

Newark

State

New Jersey

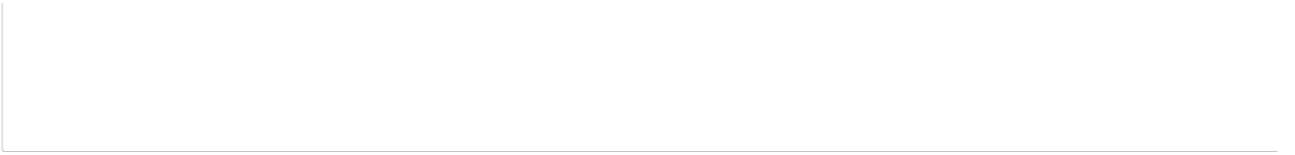
Zip

07101

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
64938.72

Additional Notes for Clarity

Optional
Held within Trust, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

iShare Core MSCI EAFE ETF

Description

Optional
IEFA

Street 1

Optional
67 Buck Road

Street 2

Optional
B29

City

Huntingdon Valley

State

Pennsylvania

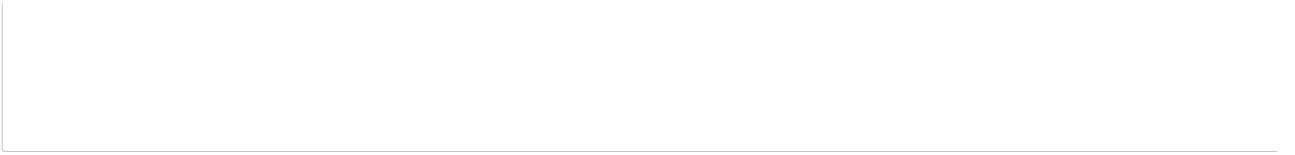
Zip

19006

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
51348.51

Additional Notes for Clarity

Optional
Held within IRA, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

Vanguard Developed Markets Index Fund Admiral Shares

Description

Optional
VTMGX

Street 1

Optional
P.O. Box 2600

Street 2

Optional

City

Valley Forge

State

Pennsylvania

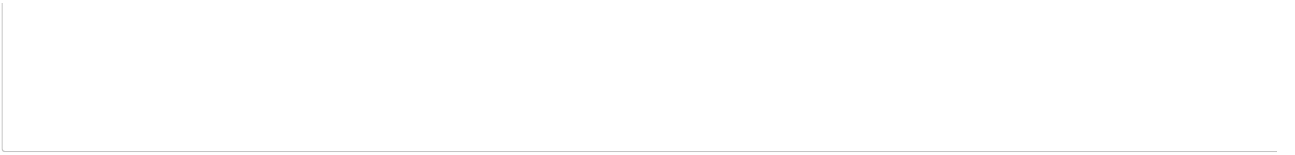
Zip

19482

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
179537.41

Additional Notes for Clarity

Optional
Held within IRA, Managed by Cerity Partners

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

Vanguard 500 Index Fund Admiral Shares

Description

Optional
VFIAX

Street 1

Optional
P.O. Box 2600

Street 2

Optional

City

Valley Forge

State

Pennsylvania

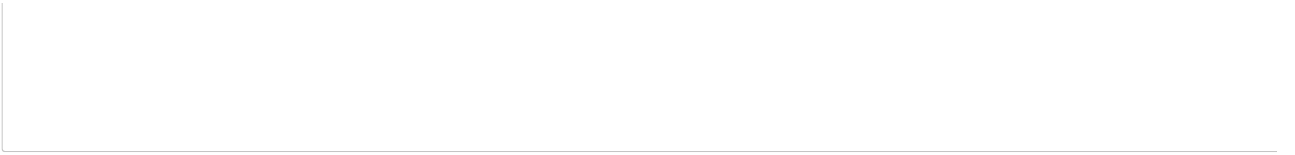
Zip

19482

Country

Optional
United States

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2025

Security/Investment Information

Disclosed For

Optional
Filer

Investment Type

ETF/Index/Mutual Fund - Blended Equity

Ownership

Optional
Ownership - Full

Value of security at end of reporting period

Optional
259777.17

Additional Notes for Clarity

Optional

Holdings/Investment/Fund Information

Holdings/Investment/Fund Name

State Street Target Retirement Fund 2035

Description

Optional
State of Michigan 401(k) - VOYA

Street 1

Optional
One Iron Street

Street 2

Optional

City

Boston

State

Massachusetts

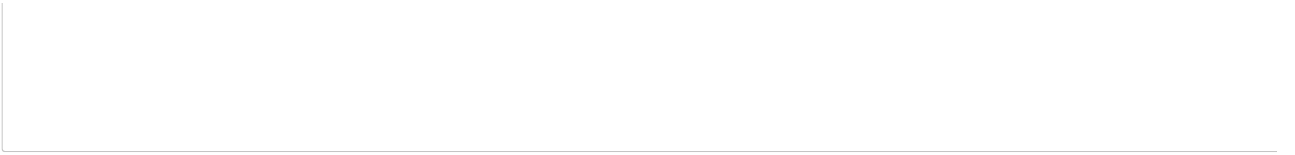
Zip

02210

Country

Optional
United States

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2025

Income Information

Type of Unearned Income

Taxable Interest

Name of Source of Unearned Income

Charles Schwab & Co, Inc.

Unearned income does not include inheritance money or a familial gift.

Description of Unearned Income

Optional
Taxable Interest

Address of Unearned Income Source

Street 1

Optional
3000 Schwab Way

Street 2

Optional

City

Westlake

State

Texas

Zip

76562

Country

Optional
United States

Income Information

Total Income from the Source During Reporting Period

Optional
163.00

Did this cease being a source of unearned income during the reporting period?

Optional
No

Additional Notes for Clarity

Optional

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2025

Unearned Income 2 - Capital Gains

Income Information

Type of Unearned Income

Capital Gain Distributions

Name of Source of Unearned Income

Charles Schwab & Co, Inc.

Unearned income does not include inheritance money or a familial gift.

Description of Unearned Income

Optional
Capital Gains

Address of Unearned Income Source

Street 1

Optional
3000 Schwab Way

Street 2

Optional

City

Westlake

State

Texas

Zip

76562

Country

Optional
United States

Income Information

Total Income from the Source During Reporting Period

Optional
11636.00

Did this cease being a source of unearned income during the reporting period?

Optional

Additional Notes for Clarity

Optional

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2025

Income Information

Type of Unearned Income

Other type as described by the IRS (describe)

Describe Other Type

Tax-Exempt Interest

Name of Source of Unearned Income

Charles Schwab & Co, Inc.

Unearned income does not include inheritance money or a familial gift.

Description of Unearned Income

Optional

Tax-Exempt Interest

Address of Unearned Income Source

Street 1

Optional

3000 Schwab Way

Street 2

Optional

City

Westlake

State

Texas

Zip

76562

Country

Optional

United States

Income Information

Total Income from the Source During Reporting Period

Optional

8791.00

Did this cease being a source of unearned income during the reporting period?

Optional

No

Additional Notes for Clarity

Optional

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2025

Income Information

Type of Unearned Income

Other type as described by the IRS (describe)

Describe Other Type

Ordinary Dividends

Name of Source of Unearned Income

Charles Schwab & Co, Inc.

Unearned income does not include inheritance money or a familial gift.

Description of Unearned Income

Optional

Ordinary Dividends

Address of Unearned Income Source

Street 1

Optional

3000 Schwab Way

Street 2

Optional

City

Westlake

State

Texas

Zip

76562

Country

Optional

United States

Income Information

Total Income from the Source During Reporting Period

Optional

19865.00

Did this cease being a source of unearned income during the reporting period?

Optional

No

Additional Notes for Clarity

Optional

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2025

Income Information

Type of Unearned Income

Other type as described by the IRS (describe)

Describe Other Type

Qualified Dividend

Name of Source of Unearned Income

Charles Schwab & Co, Inc.

Unearned income does not include inheritance money or a familial gift.

Description of Unearned Income

Optional

Qualified dividends

Address of Unearned Income Source

Street 1

Optional

3000 Schwab Way

Street 2

Optional

City

Westlake

State

Texas

Zip

76562

Country

Optional

United States

Income Information

Total Income from the Source During Reporting Period

Optional

17827.00

Did this cease being a source of unearned income during the reporting period?

Optional

No

Additional Notes for Clarity

Optional

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