



Review & Certification

Employer(s) and Sources of Earned Income

For	Source	Employer	Occupation	Position	Income	Street 1	Street 2	City	State	Zip	Date Left
Filer	Employer	State of Michigan	Elected Official	Governor		DTMB Office of -Financial Management		Lansing	Michigan	48909	

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Sources of Unearned Income

Type	Other Type	Source	Description	Street 1	Street 2	City	State	Zip	Amount	Date Stopped	Notes
Taxable Interest		Charles Schwab & Co, Inc.	Taxable interest income on investments held within managed investment account.	3000 Schwab Way		Westlake	Texas	76262	149.00		
Stock Dividends		Charles Schwab & Co, Inc.	Ordinary dividends on investments held within managed investment account.	3000 Schwab Way		Westlake	Texas	76262	18,432.00		
Capital Gain Distributions		Charles Schwab & Co, Inc.	Long-Term gain on investments held within managed investment account.	3000 Schwab Way		Westlake	Texas	76262	3,327.00		
Other type as described by the IRS (describe)	Tax-exempt Interest	Charles Schwab & Co, Inc.	Tax-Exempt Interest	3000 Schwab Way		Westlake	Texas	76262	10,657.00		
Other type as described by the IRS (describe)	Qualified Dividends	Charles Schwab & Co, Inc.	Qualified Dividends	3000 Schwab Way		Westlake	Texas	76262	17,672.00		

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Positions in Organizations

Type	Other Type	Position	Other Position	Ownership Interest	Notes	Name	Street 1	Street 2	City	State	Zip
Corporation		Other	Member	Yes	LLC	Super Deluxe, LLC	500 Woodward Ave.	Suite 3500	Detroit	Michigan	48226

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Property Type	Other Type	Property Description	Other Description	Ownership Type	Other Ownership Type	Value	Notes	Street 1	City	State	Zip
Residential		House		Ownership - Full		418,200.00	Cottage. Value estimated based on SEV.	Timber Lake Drive	Elk Rapids	Michigan	49629

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Securities & Investments

For	Source Type	Other Security Type	Ownership	Other Ownership Type	Value	Notes for Clarity	Source Name	Street 1	Street 2	City	State
Filer	401k/Tax-Deferred Investment Account		Ownership - Full		195,892.00	Voya Financial, Michigan Office of Retirement Services	State Street Target Retirement 2035 Fund	1 Iron Street		Boston	Massachusetts
Filer	ETF/Index/Mutual Fund - Blended Equity		Ownership - Full		188,948.00	HLMIX	Harding Loevner Intl Equity Port Inst	400 Crossing Boulevard		Bridgewater	New Jersey
Filer	ETF/Index/Mutual Fund - Blended Equity		Ownership - Full		382,135.00	VWIUX	Vanguard Interm Term Tax Exempt Admin	PO Box 2600		Valley Forge	Pennsylvania
Filer	ETF/Index/Mutual Fund - Blended Equity		Ownership - Full		1,003,294.00	VTSAX	Vanguard Total Stock MKT Index FD Admiral Share	PO Box 2600		Valley Forge	Pennsylvania
Filer	ETF/Index/Mutual Fund - Blended Equity		Ownership - Full		53,780.00	GWGIX	AMG GW&K Small Mid Cap Fd I	600 Steamboat Rd	#300	Greenwich	Connecticut
Filer	401k/Tax-Deferred Investment Account		Ownership - Full		106,282.00	IRA Rollover - HNLVX	Harbor Large Cap Value Fd Ret CI	111 South Wacker Drive	34th Floor	Chicago	Illinois
Filer	401k/Tax-Deferred Investment Account		Ownership - Full		124,177.00	IRA Rollover - GWGIX	AMG GW&K Small Mid Cap Fd I (IRA)	600 Steamboat Rd	#300	Greenwich	Connecticut
Filer	401k/Tax-Deferred Investment Account		Ownership - Full		131,740.00	IRA Rollover - VBILX	Vanguard Interm Term Bond Index Adm	PO Box 2600		Valley Forge	Pennsylvania
Filer	401k/Tax-Deferred Investment Account		Ownership - Full		51,897.00	IRA Rollover - TSPNX	T Rowe Price Spectrum Income Fund Inv	4515 Painters Mill Road	Mail Code 17300	Owings Mills	Maryland
Filer	401k/Tax-Deferred Investment Account		Ownership - Full		273,973.00	IRA Rollover - VFIAIX	Vanguard 500 Index Adm	PO Box 2600		Valley Forge	Pennsylvania
Filer	401k/Tax-Deferred Investment Account		Ownership - Full		49,832.00	IRA Rollover - VTMGX	Vanguard Developed Markets Index Adm	PO Box 2600		Valley Forge	Pennsylvania

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Assets

Type	Other Type	Description	Fair Market Value	Notes
Cash (Liquid) Assets (Checking/Savings, Cash, cash equivalents)		Cash		Charles Schwab & Co, Inc.
Cash (Liquid) Assets (Checking/Savings, Cash, cash equivalents)		Checking Account	-	

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Liabilities

Blind Trusts

No Disclosures

Employment Agreements

No Disclosures

Spouse Lobbyist Activity

No Disclosures

Lobbyist Interactions

Item Name	Item/Service	Other Item/Service	Description	Other Description	Purpose	Other Purpose	\$76 or Less?	Value	Paid	Date	Notes
Food & Beverage	Other	food & beverage	Other (describe)	meals	Meal/Drink Consumed at Time of Gift		Yes			-DEC 31,2023	Make it Michigan airport tour (Used 12/31/2023 as date because lobbyist reported meal on 2023 winter report by lobbyist)
food & beverage	Other	food & beverage	Other (describe)	meals	Meal/Drink Consumed at Time of Gift		No	127.00		-DEC 31,2023	(Used 12/31/2023 as date because lobbyist reported meal on 2023 winter report by lobbyist)

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Interests in State Contracts

No Disclosures

Please contact the filer to complete the submission.

Previous

Save and Exit