



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Shri Thanedar  
**Status:** Member  
**State/District:** MI13

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2022  
**Filing Date:** 09/27/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alphabet Inc. - Class A (GOOGL) [ST]		\$100,001 - \$250,000	None		
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$100,001 - \$250,000	None		
Amazon.com, Inc. (AMZN) [ST]		\$50,001 - \$100,000	None		
American Express Company (AXP) [ST]		\$50,001 - \$100,000	Dividends	Not Applicable	\$1,001 - \$2,500
Apollo Global Management, Inc. (APO) [ST]		\$100,001 - \$250,000	Dividends	Not Applicable	\$2,501 - \$5,000
Apple Inc. (AAPL) [ST]		\$500,001 - \$1,000,000	Dividends	Not Applicable	\$2,501 - \$5,000
ARK Innovation ETF (ARKK) [ST]		\$1,001 - \$15,000	None		
Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 - \$250,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Biogen Inc. (BIIB) [ST]		\$15,001 - \$50,000	None		
Bitcoin [OT]		\$100,001 - \$250,000	None		
DESCRIPTION: Cryptocurrency					
Blackstone Inc. (BX) [ST]		\$50,001 - \$100,000	Dividends	Not Applicable	\$5,001 - \$15,000
BNY Mellon US Large Cap Core Equity ETF (BKLC) [EF]		\$100,001 - \$250,000	Dividends	Not Applicable	\$1,001 - \$2,500
Cash - Investment Accounts [BA]		\$100,001 - \$250,000	Interest	Not Applicable	\$201 - \$1,000
Coherus BioSciences, Inc. (CHRS) [ST]		\$15,001 - \$50,000	None		
COMPASS Pathways Plc - American Depository Shares (CMPS) [ST]		\$1,001 - \$15,000	None		
DFA Emerging Markets Value Portfolio Institutional Class (DFEVX) [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	\$5,001 - \$15,000
DFA Global Allocation 60/40 Portfolio Institutional Class (DGSIX) [MF]		\$1,000,001 - \$5,000,000	Dividends	Not Applicable	\$15,001 - \$50,000
DFA Inflation-Protected Securities Portfolio Institutional Class (DIPSX) [MF]		None	Dividends	Not Applicable	\$2,501 - \$5,000
DFA Intermediate-Term Municipal Bond Portfolio Institutional Class (DFTIX) [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	\$1,001 - \$2,500
DFA International Core Equity Portfolio Institutional Class (DFIEX) [MF]		\$500,001 - \$1,000,000	Dividends	Not Applicable	\$15,001 - \$50,000
DFA International Small Cap Value Portfolio Institutional Class (DISVX) [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	\$1,001 - \$2,500
DFA US Core Equity 1 Portfolio Institutional Class (DFEOX) [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	\$2,501 - \$5,000
DFA US Core Equity II Portfolio Institutional Class		\$1,000,001 -	Capital Gains,	Not	\$50,001 -

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
(DFQTX) [MF]		\$5,000,000	Dividends	Applicable	\$100,000
DFA US Large Cap Value Portfolio Institutional Class (DFLVX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	Not Applicable	\$5,001 - \$15,000
DFA US Large Company Portfolio Institutional Class (DFUSX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	Not Applicable	\$5,001 - \$15,000
DFA US Small Cap Value Portfolio Institutional Class (DFS VX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	Not Applicable	\$15,001 - \$50,000
Dimensional 2050 Target Date Retirement Income Fund Institutional Class (DRIJX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	Not Applicable	\$5,001 - \$15,000
Dimensional US Core Equity 2 ETF (DFAC) [EF]		\$500,001 - \$1,000,000	Dividends	Not Applicable	\$5,001 - \$15,000
Dimensional World ex US Core Equity 2 ETF (DFAX) [EF]		\$250,001 - \$500,000	Dividends	Not Applicable	\$5,001 - \$15,000
Ethereum [OT]		\$100,001 - \$250,000	None		
DESCRIPTION: Cryptocurrency					
iShares Core S&P Total US Stock Market ETF (ITOT) [EF]		\$500,001 - \$1,000,000	Dividends	Not Applicable	\$5,001 - \$15,000
iShares Gold Trust (IAU) [EF]		\$15,001 - \$50,000	Capital Gains	Not Applicable	\$5,001 - \$15,000
iShares MSCI EAFE Value ETF (EFV) [EF]		\$50,001 - \$100,000	Dividends	Not Applicable	\$2,501 - \$5,000
iShares TIPS Bond ETF (TIP) [EF]		\$100,001 - \$250,000	Dividends	Not Applicable	\$5,001 - \$15,000
JPMorgan US Treasury Plus Money Market Fund-Premier (PJTXX) [MF]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
KKR & Co. Inc. (KKR) [ST]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Litecoin [OT]		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Cryptocurrency					
Microsoft Corporation (MSFT) [ST]		\$100,001 - \$250,000	Dividends	Not Applicable	\$1,001 - \$2,500
Missouri 529 Plan/Age Based [5P]		\$50,001 - \$100,000	None		
LOCATION: MO					
DESCRIPTION: 529 age based plan					
Rental Property in Ann Arbor, MI [RE]		\$1,000,001 - \$5,000,000	Rent	Not Applicable	\$100,001 - \$1,000,000
Rental Property in Oxford, NJ [RE]		\$500,001 - \$1,000,000	Rent	Not Applicable	\$100,001 - \$1,000,000
Starbucks Corporation (SBUX) [ST]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Tencent Holdings Limited Unsponsored ADR Representing B Shares (TCEHY) [ST]		None	Dividends	Not Applicable	\$201 - \$1,000
Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	Capital Gains	Not Applicable	\$5,001 - \$15,000
The Carlyle Group Inc. (CG) [ST]		\$50,001 - \$100,000	Dividends	Not Applicable	\$2,501 - \$5,000
Vanguard Information Technology Index Fund ETF (VGT) [EF]		\$50,001 - \$100,000	Dividends	Not Applicable	\$201 - \$1,000
Vanguard 500 Index Fund Admiral Shares (VFIAX) [MF]		\$1,000,001 - \$5,000,000	Dividends	Not Applicable	\$15,001 - \$50,000
Vanguard 500 Index Fund ETF (VOO) [EF]		\$1,000,001 - \$5,000,000	Dividends	Not Applicable	\$15,001 - \$50,000
Vanguard Balanced Index Fund Admiral Shares (VBIAX) [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	Not Applicable	\$15,001 - \$50,000
Vanguard Commodity Strategy Fund Admiral Shares (VCMDX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	Not Applicable	\$5,001 - \$15,000
Vanguard Emerging Markets Stock Index Fund Admiral		\$15,001 - \$50,000	Dividends	Not	\$1,001 -

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Shares (VEMAX) [MF]				Applicable	\$2,500
Vanguard Energy Index Fund ETF (VDE) [EF]		\$50,001 - \$100,000	Dividends	Not Applicable	\$2,501 - \$5,000
Vanguard Inflation-Protected Securities Fund Admiral Shares (VAIPX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	Not Applicable	\$2,501 - \$5,000
Vanguard LifeStrategy Growth Fund Investor Shares (VASGX) [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	Not Applicable	\$50,001 - \$100,000
Vanguard LifeStrategy Moderate Growth Fund Investor Shares (VSMGX) [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	Not Applicable	\$15,001 - \$50,000
Vanguard Real Estate Index Fund Admiral Shares (VGSLX) [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	\$5,001 - \$15,000
Vanguard Short-Term Inflation-Protected Securities Index Fund Admiral Shares (VTAPX) [MF]		None	Dividends	Not Applicable	\$1,001 - \$2,500
Vanguard Small Cap Value Index Fund Admiral Shares (VSIAX) [MF]		\$250,001 - \$500,000	Dividends	Not Applicable	\$5,001 - \$15,000
Vanguard Small Cap Value Index Fund ETF (VBR) [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	\$2,501 - \$5,000
Vanguard Total Bond Market Index Fund Admiral Shares (VBTLX) [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	\$2,501 - \$5,000
Vanguard Total International Stock Index Fund Admiral Shares (VTIAX) [MF]		\$500,001 - \$1,000,000	Dividends	Not Applicable	\$15,001 - \$50,000
Vanguard Total Stock Market Index Fund Admiral Shares (VTSAX) [MF]		\$1,000,001 - \$5,000,000	Dividends	Not Applicable	\$15,001 - \$50,000
Vanguard Total Stock Market Index Fund ETF (VTI) [EF]		\$500,001 - \$1,000,000	Dividends	Not Applicable	\$5,001 - \$15,000
Vanguard Total World Stock Index Fund Admiral Shares (VTWAX) [MF]		\$500,001 - \$1,000,000	Dividends	Not Applicable	\$5,001 - \$15,000
Vanguard Total World Stock Index Fund ETF (VT) [EF]		\$500,001 - \$1,000,000	Dividends	Not Applicable	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Value Index Fund ETF (VTV) [EF]		\$100,001 - \$250,000	Dividends	Not Applicable	\$2,501 - \$5,000
Walmart Inc. (WMT) [ST]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000

\* 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
State of Michigan	Salary	\$71,000.00	\$71,000.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	UBS Credit Card	On Going balance in the account	Credit Card Purchases	\$15,001 - \$50,000
	TriState Capital Bank	December 2021 - Present	Line of Credit Against Investment Account	\$1,000,001 - \$5,000,000
	LPL Financial	April 2022 - Present	Margin on Investment Account	\$5,000,001 - \$25,000,000
	Old National Bank	2018	Rental property in Ann Arbor	\$1,000,001 - \$5,000,000
	Capital One Credit Card	On Going balance in the account	Credit Card	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Shri Thanedar Living Trust
Trustee	Collateral Trust
Trustee	Thanedar Neil Irrev Trust
Trustee	Thanedar Samir Irrev Trust

Director	Project Healthy Community
Representative	State of Michigan

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
2021	Congressman Thanedar and State of Michigan	Retirement plan to be paid out upon eligibility. No longer contributing.

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

None disclosed.

## 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:** Hon. Shri Thanedar , 09/27/2023