



Filing ID #10054404

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Hillary Scholten  
**Status:** Member  
**State/District:** MI03

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2022  
**Filing Date:** 08/13/2023  
**Period Covered:** 01/01/2021– 12/31/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 401(k) ⇒ FID Freedom 2040 K [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Lake Michigan Credit Union [BA] DESCRIPTION: Checking Account		\$1,001 - \$15,000	Interest	Not Applicable	\$1 - \$200
Miller Johnson 401(k) ⇒ Fidelity Emerging Markets Idx [MF]		\$1,001 - \$15,000	Tax-Deferred		
Miller Johnson 401(k) ⇒ Schwab International Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Miller Johnson 401(k) ⇒ Schwab Total Stock Market Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Miller Johnson 401(k) ⇒ Vanguard Small Cap Value Index Admi [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley 1 ⇒ Cash [BA]	JT	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley 1 ⇒ MFS Global Equity A (MWEFX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley 1 ⇒ MFS Global Equity C (MWE CX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley 2 ⇒ MFS Global Equity A (MWEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley 2 ⇒ MFS Global Equity C (MWE CX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley 3 ⇒ MFS Global Equity A (MWEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley 3 ⇒ MFS Global Equity C (MWE CX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Mutual of America ⇒ Mutual of America 2035 Retirement Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
TIAA-CREF ⇒ T-C Lifecycle 204-Inst [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

\* Asset class 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 Current Year to Filing	Amount Preceding Year
Calvin University	Spouse salary	N/A	N/A
Miller Johnson	Salary	N/A	\$128,752.49
Institute for Nonprofit News	Spouse's consulting	N/A	N/A
John S. and James L. Knight Foundation	Spouse's consulting	N/A	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Old National Bank	2017	Home mortgage	\$100,001 - \$250,000
JT	Lake Michigan Credit Union	2019	Home equity loan	\$50,001 - \$100,000

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

**SCHEDULE A ASSET CLASS DETAILS**

- Fidelity 401(k) (Owner: SP)
- Miller Johnson 401(k)
- Morgan Stanley 1 (Owner: JT)
- Morgan Stanley 2 (Owner: DC)
- Morgan Stanley 3 (Owner: DC)
- Mutual of America
- TIAA-CREF (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:** Hon. Hillary Scholten , 08/13/2023