



Filing ID #10056929

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Jeff Raatz
Status: Congressional Candidate
State/District: IN06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 04/5/2024
Period Covered: 01/01/2023– 03/8/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameritrade Account ⇒ Ameritrade Account [FU] DESCRIPTION: Did not trade at all in 2023	JT	\$1,001 - \$15,000	None		
Defined Contribution Fund ⇒ INPERS Legislator 2035 Fund [OT] DESCRIPTION: INPERS Legislators 2035 Fund		\$1,001 - \$15,000	None		
Defined Contribution Fund ⇒ INPERS Legislator 2040 Fund [OT] DESCRIPTION: INPERS Legislator 2040 Fund		\$1 - \$1,000	None		
Defined Contribution Fund ⇒ INPERS Legislator Fixed Income Fund [OT] DESCRIPTION: Legislator Defined Contribution Fund		\$100,001 - \$250,000	None		
Defined Contribution Fund ⇒ Voya Plan 664463 Vanguard Federal & Fidelity 500 [BA] DESCRIPTION: 401A Miami of Ohio	SP	\$15,001 - \$50,000	None		
Defined Contribution Fund ⇒	SP	\$50,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Voya VF2234 401A, 100% Interest [OT] DESCRIPTION: Defined Contribution Fund		\$100,000			
FirstBank RIchmond, Richmond Indiana, 100% Interest [OT] DESCRIPTION: Checking and Savings Accounts	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Variable Annuity ⇒ Midland National Variable Annuity, 100% Interest [OT] DESCRIPTION: Midland National Variable Annuity	SP	\$1,001 - \$15,000	None		
Variable Annuity ⇒ Midland National Variable Annuity, 100% Interest [OT] DESCRIPTION: Midland National Variable Annuity		\$15,001 - \$50,000	None		

* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Miami University	Spouce Salary	N/A	N/A
State of Indiana	Worked in The Indiana Senate	\$35,232.28	\$54,567.16
Marketplace Ministries	My Salary	\$584.60	\$2,446.22
Ratz LLC	Commission Insurance sales	N/A	\$7,799.91

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
State Board Member	Crossroads of America Council
Advisory Board Member	Indiana University East
Board Member	Every Child Can Read

Board Member

Governors Work Force Cabinet

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Ameritrade Account (Owner: JT)
LOCATION: Indiana, IN, US
DESCRIPTION: Trading Account that I did not trade in 2022
- Defined Contribution Fund (Owner: SP)
DESCRIPTION: Spouces 401K
- Defined Contribution Fund
- Variable Annuity (Owner: SP)
- Variable Annuity

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: Jeff Raatz , 04/5/2024