



Filing ID #10050812

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Marie Newman  
**Status:** Former Member  
**State/District:** IL03

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2023  
**Filing Date:** 01/27/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Acorn Moderately Aggressive Fund [MF]	SP	\$15,001 - \$50,000	Capital Gains	None	<input type="checkbox"/>
BMO Harris Everyday Checking Account [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
BMO Harris Everyday Checking Account [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
BMO Harris Interest Gold Checking Account [BA]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
BMO Harris Portfolio Checking Account [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
BMO Harris Savings Account [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab JT TEN ⇒ Cash [BA]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Charles Schwab JT TEN ⇒ Coinbase Global, Inc. - Class A (COIN) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab JT TEN ⇒ Glenmede Quant US Large [MF]	JT	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab JT TEN ⇒ Invesco QQQ [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab JT TEN ⇒ Simplify U.S. Equity PLUS GBTC ETF (SPBC) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab JT TEN ⇒ SPDR S & P 500 ETF [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab JT TEN ⇒ The Consumer Staples Select Sector SPDR Fund [EF] DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab JT TEN ⇒ Vanguard Small-Cap Index Fund [EF] DESCRIPTION: JAMES D NEWMAN & MARIE K NEWMAN JT TEN	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fundrise ⇒ Fundrise [RE]	SP	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Individual 401(K) ⇒ Cash [IH] DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Individual 401(K) ⇒ Schwab U.S. Broad Market ETF [EF] DESCRIPTION: JAMES D. NEWMAN & ASSOC. 401(K)	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Individual 401(K) ⇒ SPDR S & P 500 ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Life Insurance [WU] DESCRIPTION: James Newman Extra Ordinary Life	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual Life Insurance [WU] DESCRIPTION: James Newman Extra Ordinary Life	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
Northwestern Mutual Life Insurance [WU] DESCRIPTION: James Newman Whole Life	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual Life Insurance [WU]	SP	\$50,001 -	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: James Newman Whole Life		\$100,000			<input type="checkbox"/>
Northwestern Mutual Life Insurance [WU]		\$250,001 - \$500,000	None		<input type="checkbox"/>
DESCRIPTION: Marie Newman Adjustable CompLife					
Rollover IRA ⇒ Akebia Therapeutics, Inc. (AKBA) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Artisan International Fund Investor Class [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Best Buy Co., Inc. (BBY) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Carnival Corporation (CCL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Cash [IH]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Rollover IRA ⇒ Cash [IH]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: JAMES D NEWMAN IRA ROLLOVER					
Rollover IRA ⇒ Cash [IH]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Charles Schwab US Reit [EF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Chewy, Inc. Class A (CHWY) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ CNA Financial Corporation (CNA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rollover IRA ⇒ Coca-Cola Company (KO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Coinbase Global, Inc. - Class A (COIN) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Energy Select Sector SPDR Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Fidelity Freedom 2030 Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Financial Select Sector SPDR Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Global X Autonom Electric Vehicle [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Global X Lithium Battery [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ GoPro, Inc. - Class A (GPRO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Hippo Holdings Inc. (HIPO) [ST]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Hodges Small Cap Fund Retail Class [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ INVESCO QQQ [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Invesco QQQ Trust [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ iShares Gold ETF [EF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares MSCI EAFE Small-Cap ETF [EF]					
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Lemonade, Inc. (LMND) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ NovoCure Limited - Ordinary Shares (NVCR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Ryder System, Inc. (R) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Salesforce, Inc. (CRM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Schwab Emerging Markets [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Schwab Fundamental Emerging Markets [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Schwab Fundamental INL [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Schwab Fundamental US [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Schwab Intermediate Term ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Schwab International [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Schwab S&P 500 Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab US Large Cap [EF]					<input type="checkbox"/>
Rollover IRA ⇒ Schwab US Small Cap [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Schwab US Small Cap [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Schwab US TIPS [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Simplify U.S. Equity PLUS GBTC ETF (SPBC) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ SPDR Dow Jones [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ SPDR Dow Jones [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ SPDR Fund Consumer Staples [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ SPDR S & P 500 [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ SPDR S&P 500 ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Starbucks Corporation (SBUX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ The Real Estate Select Sector SPDR Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ The Travelers Companies, Inc. (TRV) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Utilities Select Sector SPDR Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rollover IRA ⇒ Vanguard Communication Services ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Vanguard Equity-Income Fund Admiral Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: MARIE K NEWMAN CHARLES SCHWAB & CO INC CUST IRA ROLLOVER					
Rollover IRA ⇒ Vanguard GLBL EX US Real Estate ETF [EF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Vanguard Growth and Income [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Vanguard Intermediate Term Cor [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Vanguard Mortgage Back Sec. ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Walmart Inc. (WMT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Walt Disney Company (DIS) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ XTrackers Inter Real Est ETF [EF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA ⇒ Yatra Online, Inc. - Ordinary Shares (YTRA) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab JT TEN ⇒ Coinbase Global, Inc. - Class A (COIN) [ST]	JT	01/4/2022	P	\$1,001 - \$15,000	
Charles Schwab JT TEN ⇒ Coinbase Global, Inc. - Class A (COIN) [ST]	JT	11/21/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab JT TEN ⇒ Grayscale Bitcoin TR BTC: GBTC [OT]  LOCATION: US DESCRIPTION: Stock	JT	01/4/2022	P	\$1,001 - \$15,000	
Figo Pet Insurance [OL]  LOCATION: Chicago, IL, US DESCRIPTION: Sale of FIGO Pet Insurance	SP	08/15/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Rollover IRA ⇒ Activision Blizzard, Inc (ATVI) [ST]	SP	02/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Rollover IRA ⇒ Activision Blizzard, Inc (ATVI) [ST]	SP	02/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Rollover IRA ⇒ Coinbase Global, Inc. - Class A (COIN) [OP]  DESCRIPTION: call	SP	02/8/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Rollover IRA ⇒ Zoom Video Communications, Inc. - Class A (ZM) [ST]	SP	01/11/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>

\* 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
Figo Pet Insurance, LLC	Spouse Salary and Consulting Income	\$345,000.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Quicken Loans	2010	Home Mortgage, La Grange, IL	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

None disclosed.



**SCHEDULE F: AGREEMENTS**

None disclosed.

**SCHEDULE G: GIFTS**

None disclosed.

**SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS**

None disclosed.

**SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA**

None disclosed.

**SCHEDULE A AND B ASSET CLASS DETAILS**

<div><div>◦ Charles Schwab JT TEN (Owner: JT) LOCATION: US DESCRIPTION: JAMES D NEWMAN &amp; MARIE K NEWMAN JT TEN</div><div>◦ Fundrise (Owner: SP) LOCATION: US</div><div>◦ Individual 401(K) (Owner: SP) DESCRIPTION: James D Newman Charles Schwab &amp; Co Inc Cust James D Newman &amp; Assoc 401(K)</div><div>◦ Rollover IRA DESCRIPTION: Marie K Newman Charles Schwab &amp; Co Inc Cust IRA Rollover</div><div>◦ Rollover IRA (Owner: SP) DESCRIPTION: James D Newman Charles Schwab &amp; Co Inc Cust IRA Rollover</div></div>
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**EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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. Marie Newman , 01/27/2023