



Filing ID #10056610

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** M. Zuhdi Jasser  
**Status:** Congressional Candidate  
**State/District:** AZ04

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 01/20/2024  
**Period Covered:** 01/01/2022– 12/31/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AZ Center for Hematology Profit Sharing ⇒ Fidelity Vang Target Return 2040 [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Capital Group 529 Plan ⇒ AF US Govmt Money Market [5P]  LOCATION: AZ DESCRIPTION: DP1	DC	\$1,001 - \$15,000	Tax-Deferred		
Capital Group 529 Plan ⇒ Growth Portfolio [5P]  LOCATION: AZ DESCRIPTION: DEP2	DC	\$1,001 - \$15,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity Freedom 2035 [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity TOD ⇒ Amgen Inc. (AMGN) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Fidelity TOD ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Honor Health 403(b) ⇒ Stable Value Fund: Guaranteed Income Fund [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ARK Innovation ETF [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Doubline Core Fixed Income [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Eaton Vance Short Duration [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Goldman Sachs GQG Prtners [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Interest bearing accounts at Bank of America [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Interpretive Translation of the Koran, LLC, 100% Interest [OL]  LOCATION: Phoenix, AZ, US DESCRIPTION: Company owns the rights to book	JT	\$15,001 - \$50,000	None		
Jasser Revocable Trust 4/24/09 ⇒ JP Morgan Ultra Short [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ M Zuhdi Jasser MD PC, 100% Interest [OL]  LOCATION: Phoenix, AZ, US DESCRIPTION: This is my medical practice under the dba "Jasser Center for Comprehensive Care". My practice includes internal medicine and also nuclear cardiology stress testing and imaging.	JT	\$500,001 - \$1,000,000	S Corp Income	\$100,001 - \$1,000,000	\$50,001 - \$100,000
Jasser Revocable Trust 4/24/09 ⇒ Navy Mutual Paid Up Permanent Life [WU]	JT	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ Rental Property Peoria, AZ [RP]  LOCATION: Peoria, AZ, US	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
Jasser Revocable Trust 4/24/09 ⇒ Schwab Bank Sweep Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jasser Revocable Trust 4/24/09 ⇒ Schwab Fundamental US [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Schwab US Large Cap ETF [EF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$1,001 - \$2,500
Jasser Revocable Trust 4/24/09 ⇒ Z Leasing, LLC, 100% Interest [OL]  LOCATION: Phoenix, AZ, US DESCRIPTION: Property rental company, currently inactive	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Jasser Revocable Trust 4/24/09 ⇒ Z Liberty, LLC, 100% Interest [OL]  LOCATION: Phoenix, AZ, US DESCRIPTION: Professional Consulting Services	JT	\$50,001 - \$100,000	S Corp Income	\$15,001 - \$50,000	\$15,001 - \$50,000
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ DFA Real Estate Securities Portfolio [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Invesco Diversitied Dividend Fund [EF]	JT	\$50,001 - \$100,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Janus Henderson Triton Fund [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Lord Abbett High Yiled R6 [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Pimco Real Return Fund Inst [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Principal Midcap S7P 400 index fund [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Principal Small Cap S&P 600 Index [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Vanguard Growth Index Fund Admiral [EF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Vanguard Money Market [BA]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Vanguard Short term Investment Grade [EF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Vanguard Value Index Fund Admiral [EF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement ⇒ FID Growth Co Pool A [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement ⇒ JPM CB CR DRE 2040 CC [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement ⇒ JPM CB CR DRE 2045 CC [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement ⇒ JPM Smtret 2040 R6 [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ M. Zuhdi Jasser, MD PC ⇒ Bank of Montreal (BMO) [BA]	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Z Liberty LLC ⇒ Wells Fargo [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ ishares 20+ Yr [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ ishares IBOXV \$ [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch ⇒ ishares Inc Core MSCI [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ ishares MBS ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ ishares TR Core MSCI [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ ishares TR CORE MSCI EAF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Schwab ST US [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Growth EFT [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Interim term [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Scottsdale [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Short Term [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Value ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

\* 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
M. Zuhdi Jasser MD PC	Salary	\$56,827.00	\$35,693.00
Advanced Nuclear Cardiology PLLC	Salary	\$68,150.00	\$35,875.00
Z Liberty, LLC	Salary	\$75,000.00	\$68,000.00
Honor Health	spouse salary	N/A	N/A

Banner Health Network	spouse salary	N/A	N/A
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## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	12/31/23	Credit Card Revolving credit 12/31/2023	\$15,001 - \$50,000
JT	CHP 1010 McDowell LLC,	6/1/2018	Liability on lease through 2/28/2030	\$500,001 - \$1,000,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
President and CEO	M. Zuhdi Jasser, MD PC
President and CEO	Z Liberty, LLC
President and Director	The American Islamic Forum for Democracy
Member of board of directors	Private Practice Physicans Congress
Medical Director for Bioethics	Banner Health Network
Medical Director	Summit Healthcare Services
Member of Credentials Committee	Banner Health Network
Senior Fellow	Center for Security Policy
Medical Director	Canyon Home Care and Hospice
COMMENTS: Resigned August 30, 2022	
Member of Governance Committee	Care Integration Network (Banner Health Network)
Board Member	Arizona Medical Association
Board Member	NotMyKid
Board Member	American Conservative Union Foundation
COMMENTS: Resigned December 2022.	
Board Member	Arizona Medical Political Action Committee
COMMENTS: Resigned effective September 1, 2023	

## SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Banner Health (Phoenix, AZ, US)	Medical Director for Bioethics
Center for Security Policy (Washington, DC, US) COMMENTS: uncompensated as of Nov. 1, 2023	Senior fellow
Valley of the Sun Hospice, LLC dba Summit Health Care (Phoenix, AZ, US) COMMENTS: Started September 2022.	Medical Director for Home Health and Hospice
Canyon Home Health & Hospice (Phoenix, AZ, US) COMMENTS: Completed service August of 2022	Medical Director for Hospice
AARP Supplemental Health Plan (Atlanta, GA, US)	Patient insurance provider
Aetna (Lexington, KY, US)	Patient insurance provider
Blue Cross Blue Shield (Phoenix, AZ, US)	Patient insurance provider
Cigna (Chattanooga, TN, US)	Patient insurance provider
Devoted Health Plan (Eagan, MN, US)	Patient insurance provider
Humana (Lexington, KY, US)	Patient insurance provider
BCBS MEDICARE ADVANTAGE-Medisun, (Phoenix, AZ, US)	Patient insurance provider
MEDICARE (Fargo, ND, US)	Patient insurance provider
UHC-MEDICARE ADVANTAGE AARP OPTUMCARE (Las Vegas, NV, US)	Patient insurance provider
GHI NEW YORK GROUP HEALTH (New York, NY, US)	Patient insurance provider
United Health CARE (Salt Lake City, UT, US)	Patient insurance provider
UMR (Salt Lake City, UT, US)	Patient insurance provider
HNB Echo (Westlake, OH, US)	Patient insurance provider
Healthcare Documentation Integrity Conference (Modesto, CA, US)	Consulting related to increasing accuracy of medical records
AHCCCS COMPLETE CARE (Farmington, MS, US)	Patient insurance provider
AHCCCS BUFC (Phoenix, AZ, US)	Patient insurance provider
Gilsbar Inc (Covington, LA, US)	Patient insurance provider

Source (Name and Address)	Brief Description of Duties
UHC - Medicare Advantage (Salt Lake City, UT, US)	Patient insurance provider
USAA LIFE INS COMPANY (San Antonio, TX, US)	Patient insurance provider
ALLIED BENEFIT SYSTEM INC (Chicago, IL, US)	Patient insurance provider
UHC – MEDICARE ADVANTAGE BANNER (Phoenix, AZ, US)	Patient insurance provider
GEHA (Independence, MO, US)	Patient insurance provider
HUMANA CHOICE MEDICARE ADVANTAGE (Lexington, KY, US)	Patient insurance provider
AMBETTER (Farmington, MO, US)	Patient insurance provider
TRANSAMERICA (Valley Forge, VA, US)	Patient insurance provider
AHCCCS MEDICAR ADVANTAGE-DUAL COMPLETE (Kingston, NY, US)	Patient insurance provider
UHS (Salt Lake City, UT, US)	Patient insurance provider
AMERIBEN SOLUTION INC (Boise, ID, US)	Patient insurance provider
GOLDEN RULES INSURANCE (Lawrenceville, IL, US)	Patient insurance provider
MUTUAL OF OMAHA INC (Omaha, NE, US)	Patient insurance provider
AETNA SENIOR SUPPLEMENT INC (Brentwood, TN, US)	Patient insurance provider
AHCCCCS MERCY CARE PLAN (Phoenix, AZ, US)	Patient insurance provider
MEDICARE ADVANTAGE ALLWELL (Farmington, MO, US)	Patient insurance provider
MEDICARE ADVANTAGE CIGNA HEALTH SPRING (Phoenix, AZ, US)	Patient insurance provider
AHCCCS UHC COMMUNITY PLAN (Kingston, NY, US)	Patient insurance provider
MEDICARE ADVANTANGE UHC-BANNER (Phoenix, AZ, US)	Patient insurance provider
Global Payments (Phoenix, AZ, US)	Patient insurance provider

### SCHEDULE A ASSET CLASS DETAILS

- AZ Center for Hematology Profit Sharing (Owner: SP)
- Capital Group 529 Plan (Owner: DC)  
LOCATION: AZ



- Fidelity IRA (Owner: SP)
- Fidelity TOD (Owner: SP)  
LOCATION: US
- Honor Health 403(b) (Owner: SP)
- Jasser Revocable Trust 4/24/09 (Owner: JT)
- Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement (Owner: JT)
- Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement (Owner: JT)
- Jasser Revocable Trust 4/24/09 ⇒ M. Zuhdi Jasser, MD PC (100% Interest) (Owner: JT)  
LOCATION: Phoenix, AZ, US
- Jasser Revocable Trust 4/24/09 ⇒ Z Liberty LLC (100% Interest) (Owner: JT)  
LOCATION: Phoenix, AZ, US
- Merrill Lynch (Owner: SP)  
LOCATION: US

## 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:** M. Zuhdi Jasser , 01/20/2024