



Filing ID #10055857

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Mr. Kouri Marshall
Status: Congressional Candidate
State/District: IL07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 11/17/2023
Period Covered: 01/01/2022– 10/31/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital One Bank Accounts [BA]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$1 - \$200
Fidelity Investments Brokerage Account ⇒ Fidelity Government Money Market (SPAXX) [BA]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity Investments Brokerage Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
Fidelity Investments Brokerage Account ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Fidelity Investments Brokerage Account ⇒ iShares Core S&P Small-Cap E (IJR) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Fidelity Investments Brokerage Account ⇒ iShares TR Core MSCI Total ETF (IXUS) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Fidelity Investments Brokerage Account ⇒ iShares TR U.S. Med DVC ETF (IHI) [EF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Fidelity Investments Brokerage Account ⇒	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares U S Real Estate ETF (IYR) [EF]					
Fidelity Investments Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments Roth IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments Roth IRA ⇒ iShares Core S&P Small-Cap E (IJR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments Roth IRA ⇒ iShares TR Core MSCI Total ETF (IXUS) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments Roth IRA ⇒ iShares TR U.S. Med DVC ETF (IHI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments Roth IRA ⇒ iShares U S Real Estate ETF (IYR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Northwestern University Retirement Plan 403(b) ⇒ Blackrock LP Index 2050 K (LIPKX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Northwestern University Retirement Plan 403(b) ⇒ Vanguard Extended Market Index ISP (VEMPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Northwestern University Retirement Plan 403(b) ⇒ Vanguard Inst Index PLUS (VHIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Northwestern University Retirement Plan 403(b) ⇒ Vanguard Total Intl Stock IP (VTPSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Northwestern University Voluntary Savings Plan 403(b) ⇒ Blackrock LP Index 2050 K (LIPKX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Northwestern University Voluntary Savings Plan 403(b) ⇒ Vanguard Extended Market Index ISP (VEMPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Northwestern University Voluntary	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Savings Plan 403(b) ⇒ Vanguard Inst Index PLUS (VHIX) [MF]					
Fidelity Netbenefits Northwestern University Voluntary Savings Plan 403(b) ⇒ Vanguard Total Intl Stock IP (VTPSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Rush University Medical Center 403(b) ⇒ DFA US Target Value I (DFFVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Rush University Medical Center 403(b) ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Netbenefits Rush University Medical Center 403(b) ⇒ Fidelity Extended Market Index Fund (FSMAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Rush University Medical Center 403(b) ⇒ Fidelity Intl Index Fund (FSPSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Netbenefits Rush University Medical Center 403(b) ⇒ William Blair Small Cap Growth Fund Class I (WBSIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Guideline 401(k) Chamber of Progress ⇒ Vanguard 500 Index Fund Admiral Shares (VFIAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Guideline 401(k) Chamber of Progress ⇒ Vanguard Developed Markets Index Fund Admiral Shares (VTMGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Guideline 401(k) Chamber of Progress ⇒ Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Guideline 401(k) Chamber of Progress ⇒ Vanguard Real Estate Index Fund Admiral Shares (VSGLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Guideline 401(k) Chamber of Progress ⇒ Vanguard Small-Cap Value Index Fund Admiral Shares		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(VSIAX) [MF]					
Guideline 401(k) Chamber of Progress ⇒ Vanguard Total Stock Market Index Fund Admiral Shares (VTSAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Navy Federal Credit Union Traditional IRA ⇒ Navy Federal Credit Union IRA Certificate [BA]		\$1,001 - \$15,000	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
Office of Governor JB Pritzker	Salary	N/A	\$64,249.00
Chamber of Progress	Salary	\$62,900.00	N/A
Chicago Defender	Consulting	\$1,900.00	N/A
Rush University Medical Center	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Mohela	August 2007	Student Loans	\$100,001 - \$250,000
SP	Mohela	December 2015	Student Loans	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	ChiGivesBack, Inc.

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 Investments Brokerage Account (Owner: SP)
LOCATION: US
- Fidelity Investments Roth IRA (Owner: SP)
- Fidelity Netbenefits Northwestern University Retirement Plan 403(b) (Owner: SP)
- Fidelity Netbenefits Northwestern University Voluntary Savings Plan 403(b) (Owner: SP)
- Fidelity Netbenefits Rush University Medical Center 403(b) (Owner: SP)
- Guideline 401(k) Chamber of Progress
- Navy Federal Credit Union Traditional IRA

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: Mr. Kouri Marshall , 11/17/2023