



Filing ID #10050779

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Ann Kirkpatrick
Status: Former Member
State/District: AZ02

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2023
Filing Date: 01/15/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Curley Law Firm PLLC Partnership Interest [OL] LOCATION: Phoenix/Maricopa, AZ, US DESCRIPTION: Interest in Law Partnership	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones IRA ⇒ Cash [IH]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Edward Jones IRA ⇒ SPDR S&P 500 ETF TR UNIT SERIES I S&P DEPOSITORY [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Edward Jones ROTH IRA ⇒ Cash [IH]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones ROTH IRA ⇒ iShares S&P 500 Index Fund [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity IRA ⇒ Cash [IH]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity NASDAQ Composite Index [MF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity IRA ⇒ Spartan Total Market Index Fund Adv Class [MF]	SP	\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Penn Mutual Whole Life Insurance [WU]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Vanguard Investments ⇒ Vanguard 500 Index Fund Admiral Shares [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Investments ⇒ Vanguard Total Stock Market Index Fund [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo Bank Accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo IRA ⇒ Cash [IH]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo SIMPLE IRA ⇒ Cash [IH]	JT	\$250,001 - \$500,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo SIMPLE IRA ⇒ Wells Fargo Advantage Emerging Growth Fund [MF]	JT	\$1,001 - \$15,000	None		<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

None disclosed.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Bank	May 2012	Mortgage on Flagstaff residence	\$100,001 - \$250,000
JT	Wells Fargo Bank Visa Credit Card	Various	Credit card charges	\$10,000 - \$15,000
JT	Wells Fargo Bank	Dec 2017	Mortgage on Phoenix condo	\$250,001 - \$500,000
JT	Discover	September 2020	Credit card advance	\$10,000 - \$15,000

JT	Bank of America Visa Cards	March 2020	Credit card advance	\$10,000 - \$15,000
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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

- Edward Jones IRA
- Edward Jones ROTH IRA
- Fidelity IRA (Owner: SP)
- Vanguard Investments (100% Interest) (Owner: JT)
LOCATION: US
- Wells Fargo IRA (Owner: SP)
- Wells Fargo SIMPLE IRA (Owner: JT)

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. Ann Kirkpatrick , 01/15/2023