



Filing ID #10070374

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Daniel Biss
Status: Congressional Candidate
State/District: IL09

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 09/12/2025
Period Covered: 01/01/2024– 08/13/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|----------------|-------------------------------|-----------------------|
| American Express High Yield Savings Account [BA] | SP | \$100,001 - \$250,000 | Interest | \$1,001 - \$2,500 | \$2,501 - \$5,000 |
| Chase Bank Checking Account [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Chase Bank Checking Account [BA] | SP | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Chase Bank Savings Account [BA] | SP | \$1 - \$1,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Citibank Savings Account [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Pacific life insurance policy [WU] | | \$50,001 - \$100,000 | None | | |
| Series I Savings Bond [GS] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$201 - \$1,000 |
| Series I Savings Bond [GS] | SP | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$201 - \$1,000 |
| Brandeis University Retirement Plan for Faculty and | SP | \$1,001 - \$15,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-------------------------|----------------|-------------------------------|-----------------------|
| Staff ⇒ CREF Social Choice Account - R2 (QCSCPX) [MF] | | | | | |
| Bright Start account ⇒ Active Blend Balanced Portfolio [5F] | DC | \$1,001 - \$15,000 | None | | |
| LOCATION: IL | | | | | |
| Bright Start account ⇒ Active Blend Balanced Portfolio [5F] | DC | \$15,001 - \$50,000 | None | | |
| LOCATION: IL | | | | | |
| Bright Start account ⇒ Fixed Income Portfolio [5F] | DC | \$1,001 - \$15,000 | None | | |
| LOCATION: IL | | | | | |
| Bright Start account ⇒ Fixed Income Portfolio [5F] | DC | \$1,001 - \$15,000 | None | | |
| LOCATION: IL | | | | | |
| Bright Start account ⇒ Moderate Active Blend 2028/2029 Enrollment Portfolio [5F] | DC | \$15,001 - \$50,000 | None | | |
| LOCATION: IL | | | | | |
| Bright Start account ⇒ Moderate Active Blend 2030/2031 Enrollment Portfolio [5F] | DC | \$15,001 - \$50,000 | None | | |
| LOCATION: IL | | | | | |
| Clay Mathematics Institute 403(b) DC plan ⇒ CREF Money Market Account - R1 (QCMMRX) [MF] | | \$1,001 - \$15,000 | None | | |
| National Louis University Defined Contribution Plan ⇒ CREF Inflation-Linked Bond Account - R2 (QCILPX) [MF] | SP | \$1 - \$1,000 | None | | |
| National Louis University Defined Contribution Plan ⇒ Nuveen Large Cap Responsible Equity Fund R6 (TISCX) [MF] | SP | \$50,001 - \$100,000 | None | | |
| National Louis University Defined Contribution Plan ⇒ TIAA Traditional [FN] | SP | \$1,001 - \$15,000 | None | | |
| National Louis University Defined Contribution Plan ⇒ Vanguard Intermediate-Term Bond Index Fund | SP | \$1,001 - \$15,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|----------------|-------------------------------|-----------------------|
| Admiral Shares (VBILX) [MF] | | | | | |
| National Louis University Tax Deferred Annuity Plan ⇒ Dodge & Cox Income Fund - Class X (DOXIX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| National Louis University Tax Deferred Annuity Plan ⇒ Nuveen Large Cap Responsible Equity Fund R6 (TISCX) [MF] | SP | \$15,001 - \$50,000 | None | | |
| National Louis University Tax Deferred Annuity Plan ⇒ TIAA Real Estate Account (QREARX) [MF] | SP | \$1 - \$1,000 | None | | |
| National Louis University Tax Deferred Annuity Plan ⇒ TIAA Traditional [FN] | SP | \$1,001 - \$15,000 | None | | |
| Roth IRA (Betterment) ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF] | | \$1,001 - \$15,000 | None | | |
| Roth IRA (Betterment) ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF] | | \$1,001 - \$15,000 | None | | |
| Roth IRA (Betterment) ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF] | | \$15,001 - \$50,000 | None | | |
| Roth IRA (Betterment) ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF] | | \$1,001 - \$15,000 | None | | |
| Roth IRA (Betterment) ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF] | | \$1,001 - \$15,000 | None | | |
| Roth IRA (Betterment) ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF] | | \$1 - \$1,000 | None | | |
| Roth IRA (Betterment) ⇒ TCW Transform 500 ETF (VOTE) [EF] | | \$1,001 - \$15,000 | None | | |
| Roth IRA (Betterment) ⇒ Vanguard Emerging Markets Government Bond ETF (VWOB) [EF] | | \$1 - \$1,000 | None | | |
| Roth IRA (Betterment) ⇒ Vanguard Total International Bond ETF (BNDX) [EF] | | \$1 - \$1,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|----------------|-------------------------------|-----------------------|
| The University of Chicago Contributory Retirement Plan ⇒ CREF Growth Account - R3 (QCGRIX) [MF] | | \$15,001 - \$50,000 | None | | |
| The University of Chicago Contributory Retirement Plan ⇒ CREF Social Choice Account - R3 (QCSCIX) [MF] | | \$1,001 - \$15,000 | None | | |
| The University of Chicago Contributory Retirement Plan ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF] | | \$1,001 - \$15,000 | None | | |
| The University of Chicago Contributory Retirement Plan ⇒ Vanguard FTSE Social Index Fund Institutional Shs (VFTNX) [MF] | | \$1,001 - \$15,000 | None | | |
| The University of Chicago Contributory Retirement Plan ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF] | | \$1,001 - \$15,000 | None | | |
| Traditional IRA (TIAA) ⇒ CREF Core Bond Account - Class R1 (QCBMRX) [MF] | SP | None | None | | |
| Traditional IRA (TIAA) ⇒ CREF Core Bond Account - Class R3 (QCBMIX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| Traditional IRA (TIAA) ⇒ CREF Growth Account - R1 (QCGRRX) [MF] | SP | None | None | | |
| Traditional IRA (TIAA) ⇒ CREF Growth Account - R3 (QCGRIX) [MF] | SP | \$15,001 - \$50,000 | None | | |
| Traditional IRA (TIAA) ⇒ CREF Inflation-Linked Bond Account - R1 (QCILRX) [MF] | SP | None | None | | |
| Traditional IRA (TIAA) ⇒ CREF Inflation-Linked Bond Account - R3 (QCILIX) [MF] | SP | \$15,001 - \$50,000 | None | | |
| Traditional IRA (TIAA) ⇒ CREF Social Choice Account - R1 (QCSCRX) [MF] | SP | None | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Traditional IRA (TIAA) ⇒ CREF Social Choice Account - R1 (QCSCRX) [MF] | | None | | None | |
| Traditional IRA (TIAA) ⇒ CREF Social Choice Account - R3 (QCSCIX) [MF] | | \$1,001 - \$15,000 | | None | |
| Traditional IRA (TIAA) ⇒ CREF Social Choice Account - R3 (QCSCIX) [MF] | SP | \$15,001 - \$50,000 | | None | |
| Traditional IRA (TIAA) ⇒ Nuveen Core Impact Bond Fund Retirement (TSBBX) [MF] | | \$1,001 - \$15,000 | | None | |
| Traditional IRA (TIAA) ⇒ Nuveen Large Cap Responsible Equity Fund Retirement (TRSCX) [MF] | | \$1,001 - \$15,000 | | None | |
| Traditional IRA (TIAA) ⇒ Nuveen Large Cap Responsible Equity Fund Retirement (TRSCX) [MF] | SP | \$1,001 - \$15,000 | | None | |
| Traditional IRA (TIAA) ⇒ TIAA Traditional (closed) [FN] | SP | \$1,001 - \$15,000 | | None | |
| Traditional IRA (TIAA) ⇒ TIAA Traditional (open) [FN] | SP | \$1,001 - \$15,000 | | None | |
| Waltraud Steinbrueck Revocable Trust IRA ⇒ Dodge & Cox Balanced Fund - Class I (DODBX) [MF] | SP | \$1,001 - \$15,000 | | 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 |
|---------------------------|--------------------------------|--------------------------------------|------------------------------|
| RW Ventures | Consulting work | \$.00 | \$5,000.00 |
| University of Chicago | Advance against book royalties | \$.00 | \$3,000.00 |
| City of Evanston | Salary | \$18,107.47 | \$23,670.16 |
| National Louis University | Spouse salary | \$46,174.01 | \$62,169.46 |

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|-------------------------------------|---------------------------|--|----------------------------------|
| Chicago District Tennis Association | Spouse salary | \$1,281.00 | \$845.00 |
| eBay | Resale of old electronics | \$176.10 | \$537.90 |

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|-----------------|-----------------------------|
| Director | Civic Leadership Foundation |

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Bright Start account (Owner: DC)
LOCATION: IL
- Bright Start account (Owner: DC)
LOCATION: IL
- Traditional IRA (TIAA) (Owner: SP)
- Brandeis University Retirement Plan for Faculty and Staff (Owner: SP)
- National Louis University Defined Contribution Plan (Owner: SP)
- National Louis University Tax Deferred Annuity Plan (Owner: SP)
- Roth IRA (Betterment)
- Clay Mathematics Institute 403(b) DC plan
- The University of Chicago Contributory Retirement Plan
- Waltraud Steinbrueck Revocable Trust IRA (Owner: SP)
- Traditional IRA (TIAA)

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: Daniel Biss , 09/12/2025