

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

Name: Hon. Glenn S. Grothman

Status: Member State/District: WI06

#### FILING INFORMATION

Filing Type: Annual Report

Filing Year: 2024

**Filing Date:** 08/04/2025

# SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)		Tx. > \$1,000?
SERIES I & SAVINGS BOND [GS]		\$15,001 - \$50,000	None		<b>✓</b>
DESCRIPTION: Interest accumulated upon redemption.					
$AF IRA \Rightarrow$ Capital Income Builder Cl A Shs (CAIBX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<b>V</b>
$AF IRA \Rightarrow$ SMALL CAP WORLD FUND - A (SMCWX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
$ \begin{array}{l} \text{AF IRA} \Rightarrow \\ \text{The Growth Fund of America Class A Shares (AGTHX)} \\ [\text{MF}] \end{array} $		\$250,001 - \$500,000	Tax-Deferred		<b>V</b>
$\begin{array}{l} \text{AF IRA} \Rightarrow \\ \text{The Income Fund of America, Class A Shares (AMECX)} \\ [\text{MF}] \end{array}$		\$100,001 - \$250,000	Tax-Deferred		<b>/</b>
BANK ACCOUNTS ⇒ BMO HARRIS BANK [BA]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	
BANK ACCOUNTS ⇒ HORICON BANK [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
BANK ACCOUNTS ⇒ STATE BANK OF NEWBURG [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	
BANK ACCOUNTS ⇒ SUMMIT CREDIT UNION [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
FB ROTH IRA ⇒ BANK FIVE NINE [IH]  DESCRIPTION: CASH		\$50,001 - \$100,000	Tax-Deferred		
INVESTMENTS ⇒ CONDOMINIUM [RP]  Location: WEST BEND, WI, US		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	
INVESTMENTS ⇒ THRIVENT MUTUAL BOND FUND - A [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	
INVESTMENTS ⇒ U.S. Bancorp (USB) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	
INVESTMENTS ⇒ WHOLE LIFE - STATE OF WISCONSIN LIFE INSURANCE [WU]		\$1,001 - \$15,000	None		
WI RETIREMENT (Deferred Compensation Plan) ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<b>~</b>
WI RETIREMENT (Deferred Compensation Plan) ⇒ FIDELITY CONTRAFUND COMMINGLED POOL CL3 [MF]		\$250,001 - \$500,000	Tax-Deferred		
WI RETIREMENT (Deferred Compensation Plan) ⇒ VANGUARD INSTITUTIONAL 500 INDEX TRUST [MF]		\$250,001 - \$500,000	Tax-Deferred		

# **SCHEDULE B: TRANSACTIONS**

Asset	Owner Date	Tx. Amount Type	Cap. Gains > \$200?
US Savings Bond [GS]	03/19/2024	P \$1,001 - \$15,000	
WI RETIREMENT (Deferred Compensation Plan) ⇒	06/10/2024	P \$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
EuroPacific Growth Fund Cl R-6 (RERGX) [MF]					
DESCRIPTION: Reinvested Capital Gain					
WI RETIREMENT (Deferred Compensation Plan) ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]		12/19/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvested Capital Gain					
AF IRA ⇒  Conital Income Puilder Cl A Che (CAIRY) [ME]		12/19/2024	P	\$1,001 - \$15,000	
Capital Income Builder Cl A Shs (CAIBX) [MF]  DESCRIPTION: Reinvested Capital Gain					
AF IRA ⇒		12/18/2024	P	\$15,001 - \$50,000	
The Growth Fund of America Class A Shares (AGTHX) [MF]  DESCRIPTION: Reinvested Capital Gain					
AF IRA ⇒		12/18/2024	P	\$1,001 - \$15,000	
The Growth Fund of America Class A Shares (AGTHX) [MF]		12/10/2024	•	Ψ1,001 Ψ10,000	
DESCRIPTION: Reinvested Dividend					
AF IRA $\Rightarrow$ The Income Fund of America, Class A Shares (AMECX) [MF]		12/16/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvested Dividend					
AF IRA ⇒ The Income Fund of America Class A Chance (AMECV) [ME]		12/16/2024	P	\$1,001 - \$15,000	
The Income Fund of America, Class A Shares (AMECX) [MF]  DESCRIPTION: Reinvested Dividend					
AF IRA ⇒		12/16/2024	P	\$1,001 - \$15,000	
The Income Fund of America, Class A Shares (AMECX) [MF]		, , .		1 0/	
DESCRIPTION: Reinvested Capital Gain					
AF IRA ⇒ Capital Income Builder Cl A Shs (CAIBX) [MF]		12/19/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvested Capital Gain					

<sup>\*</sup> Investment Vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit  $\underline{\text{https://fd.house.gov/reference/asset-type-codes.aspx}}.$ 

# **SCHEDULE C: EARNED INCOME**

None disclosed.

## SCHEDULE D: LIABILITIES

None disclosed.

# **SCHEDULE E: POSITIONS**

None disclosed.

#### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 1993	ME AND STATE OF WISCONSIN	PARTICIPANT IN WISCONSIN DEFERRED COMPENSATION PROGRAM WITH RETIEMENT TO BE PAID UPON ELIGIBILITY

**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 INVESTMENT VEHICLE DETAILS

0	BANK ACCOUNTS
	LOCATION: US

• FB ROTH IRA

• INVESTMENTS LOCATION: US

• AF IRA LOCATION: US

• WI RETIREMENT (Deferred Compensation Plan)

## **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?

O Yes O 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. Glenn S. Grothman, 08/04/2025