



Filing ID #10002987

# FINANCIAL DISCLOSURE REPORT

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Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

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## FILER INFORMATION

**Name:** Eric Schertzing  
**Status:** Congressional Candidate  
**State/District:** MIo8

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2014  
**Filing Date:** 05/26/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Century SEP ⇒ American Century Equity Growth	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
American Century SEP ⇒ American Century Income & Growth	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
American Century SEP ⇒ American Century Strategic Alloc; Aggressive	SP	\$15,001 - \$50,000	Tax-Deferred	None	None
American Century SEP ⇒ American Century Ultra	SP	\$15,001 - \$50,000	Tax-Deferred	None	None
American Century SEP ⇒ American Century Ultra		\$1,001 - \$15,000	Tax-Deferred	None	None
American Century SEP ⇒ American Century Value	SP	\$15,001 - \$50,000	Tax-Deferred	None	None
Coverdell Education Savings Accounts ⇒ TIAA CREF Large Cap Growth		\$15,001 - \$50,000	Tax-Deferred	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Dart Bank	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Def Comp 457b ⇒ Fed US GovtSec 2.5 Yr Inst		\$15,001 - \$50,000	Tax-Deferred	None	None
Def Comp 457b ⇒ Fidelity Contra		\$15,001 - \$50,000	Tax-Deferred	None	None
Def Comp 457b ⇒ Fidelity OTC		\$15,001 - \$50,000	Tax-Deferred	None	None
Def Comp 457b ⇒ Invesco Growth & Income		\$15,001 - \$50,000	Tax-Deferred	None	None
Def Comp 457b ⇒ Nationwide Fixed Account		\$1,001 - \$15,000	Tax-Deferred	None	None
Def Comp 457b ⇒ NW Intl Indx A		\$15,001 - \$50,000	Tax-Deferred	None	None
Def Comp 457b ⇒ NW Intl Value Inst Svc		\$15,001 - \$50,000	Tax-Deferred	None	None
Def Comp 457b ⇒ PIMCO Ttl Rtn A		\$15,001 - \$50,000	Tax-Deferred	None	None
Def Comp 457b ⇒ W&R Advisor High Income Y		\$15,001 - \$50,000	Tax-Deferred	None	None
Genworth Financial		\$15,001 - \$50,000	Interest, Tax-Deferred	\$201 - \$1,000	\$201 - \$1,000
MERS Def Benefit CV		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
MESP 529 ⇒ TIAA CREF Global Equity Index		\$50,001 - \$100,000	Tax-Deferred	None	None
MESP 529 ⇒ TIAA CREF Principal Plus Interest		\$15,001 - \$50,000	Tax-Deferred	None	None
MSU Federal Credit Union	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
rental house ⇒	JT	\$15,001 - \$50,000	Rent	\$5,001 - \$15,000	\$5,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rental house					\$15,000
LOCATION: Stockbridge, MI, US					
State of Michigan 401k ⇒ American Fund Europacific Growth	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
State of Michigan 401k ⇒ ING Small Cap Growth Equity	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
State of Michigan 401k ⇒ Jennison Large Cap Growth	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
State of Michigan 401k ⇒ RidgeWorth Funds	SP	\$1,001 - \$15,000	Tax-Deferred	None	None
State of Michigan 401k ⇒ SSgA Cash Series Treasury Fund	SP	\$1 - \$1,000	Tax-Deferred	None	None
Stock ⇒ CMS Energy Corporation (CMS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stock ⇒ Duke Realty Corporation (DRE)		None	Dividends	\$1 - \$200	\$1 - \$200
UGMA MI ⇒ Bridgeway Ultra		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
DESCRIPTION: Claire					
UGMA MI ⇒ Vanguard 500 Index		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vangard Prime Money Market	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage Account ⇒ Independent Bank Corporation (IBCP)		\$1,001 - \$15,000	None		
Vanguard Brokerage Account ⇒ Neogen Corporation (NEOG)		\$15,001 - \$50,000	None		
Vanguard IRA ⇒ Vanguard 500 Index Fund Adm	SP	\$15,001 - \$50,000	Tax-Deferred	None	None
Vanguard IRA ⇒ Vanguard Mid Cap Index Fund Adm		\$15,001 - \$50,000	Tax-Deferred	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard IRA ⇒ Vanguard Small Cap Val Indx Adm		\$15,001 - \$50,000	Tax-Deferred	None	None
Vanguard IRA ⇒ Windsor II Fund Inv	SP	\$15,001 - \$50,000	Tax-Deferred	None	None

\* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Ingham County Treasurer	salary	\$40,382	\$95,448
Michigan State University	spouse salary	\$1,224	\$28,915
Michigan Assessors Association	teaching	\$	\$900
Okemos Public Schools	spouse training	\$	\$1,500
Faith Publications	spouse writing	\$1,257	\$4,267

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Co-chair	Asset Independence Coalition
Board Chair	Capital Area Community Services
Board Chair	Ingham County Land Bank

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

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- American Century SEP (Owner: SP)
- American Century SEP
- Coverdell Education Savings Accounts  
LOCATION: US
- Def Comp 457b  
DESCRIPTION: Eric
- MESP 529  
LOCATION: MI
- rental house (50% Interest) (Owner: JT)  
LOCATION: US  
DESCRIPTION: 3838 Parman Road Stockbridge MI 49285
- State of Michigan 401k (Owner: SP)
- Stock  
LOCATION: US
- UGMA MI  
LOCATION: US
- Vanguard Brokerage Account (Owner: JT)  
LOCATION: US
- Vanguard IRA
- Vanguard IRA (Owner: SP)

## 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

## COMMENTS

## 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:** Eric Schertzing , 05/26/2014