



Filing ID #10002088

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Tony Kurtz
Status: Congressional Candidate
State/District: WI03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2014
Filing Date: 06/13/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|----------------------|----------------|-------------------------------|-----------------------|
| Annuity ⇒ Fidelity Mid Cap | JT | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Annuity ⇒ Fidelity VIP Growth | JT | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Annuity ⇒ Fidelity VIP International Cap Appreciation | JT | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Annuity ⇒ Fidelity VIP Money Market | JT | \$50,001 - \$100,000 | Tax-Deferred | None | None |
| Annuity ⇒ Fidelity VIP Value | JT | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Annuity ⇒ PIMCO VIT Total Return | JT | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Bank Accounts ⇒ Army Aviation Center FCU | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Bank Accounts ⇒ | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|--------------|-----------------------|--------------------------|--------------------------------------|------------------------------|
| Badgerland Financial | | | | | |
| Bank Accounts ⇒ Peoples State Bank | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Bank Accounts ⇒ Summit Credit Union | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Agilent Technologies, Inc. (A) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Alcoa Inc. (AA) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Altria Group, Inc. (MO) | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Brokerage Account ⇒ Arch Coal, Inc. (ACI) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Cintas Corporation (CTAS) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Cracker Barrel Old Country Store, Inc. (CBRL) | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Brokerage Account ⇒ Deere & Company (DE) | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Brokerage Account ⇒ EMC Corporation (EMC) | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Brokerage Account ⇒ Express Scripts Holding Company (ESRX) | JT | \$1,001 - \$15,000 | None | | |
| Brokerage Account ⇒ Fastenal Company (FAST) | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Brokerage Account ⇒ Fidelity Growth Company | JT | \$15,001 - \$50,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Brokerage Account ⇒ General Electric Company (GE) | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|--------------|-----------------------|--------------------------|--------------------------------------|------------------------------|
| Brokerage Account ⇒ Hexcel Corporation (HXL) | JT | \$1,001 - \$15,000 | None | | |
| Brokerage Account ⇒ International Business Machines Corporation (IBM) | JT | \$50,001 - \$100,000 | Dividends | \$1,001 - \$2,500 | \$1,001 - \$2,500 |
| Brokerage Account ⇒ Janus Globel Select CL T | JT | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Brokerage Account ⇒ Kansas City Southern (KSU) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Lowe's Companies, Inc. (LOW) | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Brokerage Account ⇒ Masco Corporation (MAS) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ McDonald's Corporation (MCD) | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Brokerage Account ⇒ Mondelez International, Inc. - Class A (MDLZ) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Philip Morris International Inc (PM) | JT | \$15,001 - \$50,000 | Dividends | \$1,001 - \$2,500 | \$1,001 - \$2,500 |
| Brokerage Account ⇒ Quanta Services, Inc. (PWR) | JT | \$15,001 - \$50,000 | None | | |
| Brokerage Account ⇒ Raymond James Financial, Inc. (RJF) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Tidewater Inc. (TDW) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Walgreen Co. (WAG) | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Brokerage Account ⇒ Walter Energy, Inc. (WLT) | JT | \$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 |
|---|-------|----------------------|----------------|-------------------------------|-----------------------|
| Education Account Kaylin Kurtz ⇒ NH Portfolio 2015 (Fidelity Funds) | DC | \$50,001 - \$100,000 | None | | |
| LOCATION: NH | | | | | |
| Education Account Nicholas Kurtz ⇒ MA Portfolio 2018 (Fidelity Funds) | DC | \$15,001 - \$50,000 | None | | |
| LOCATION: MA | | | | | |
| IRA for Anthony Kurtz ⇒ Fidelity Blue Chip Growth | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IRA for Anthony Kurtz ⇒ Fidelity Capital and Income Fund | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IRA for Anthony Kurtz ⇒ Fidelity Cash Reserves | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Anthony Kurtz ⇒ Fidelity Growth Discovery Fund | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Anthony Kurtz ⇒ Fidelity Growth Discovery Fund | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Anthony Kurtz ⇒ Fidelity Growth Discovery Fund | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Anthony Kurtz ⇒ Fidelity International Discovery, 100% Interest | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Anthony Kurtz ⇒ Fidelity International Small CAP OPP Fund | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IRA for Anthony Kurtz ⇒ Fidelity Magellan | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IRA for Anthony Kurtz ⇒ Sparton US Bond Index Fidelity Adv Class | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity Blue Chip Growth | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity Capital and Income | SP | \$15,001 - \$50,000 | Tax-Deferred | None | None |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| IRA for Kimberly Kurtz ⇒ Fidelity Cash Reserves | SP | \$100,001 - \$250,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity Contrafund | SP | \$50,001 - \$100,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity Inflation Protected Bond | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity International Discovery | SP | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity International Discovery | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity Low Priced Stock Fund | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity New Markets Income | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity Value Fund | SP | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Fidelity Value Fund | SP | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Janus Fund Class T shares | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| IRA for Kimberly Kurtz ⇒ Janus Global Select CL T | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ AFLAC Incorporated (AFL) | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Cisco Systems, Inc. (CSCO) | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Deere & Company (DE) | SP | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Fidelity Capital and Income | SP | \$15,001 - \$50,000 | Tax-Deferred | None | None |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-------------------------|--------------------|-------------------------------|-----------------------|
| Kaynick Anesthesia 401k ⇒ Fidelity Cash Reserves | SP | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Freeport-McMoRan Copper & Gold, Inc. (FCX) | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Janus Triton Fund Class T Shares | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Johnson & Johnson (JNJ) | SP | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Pfizer, Inc. (PFE) | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Philip Morris International Inc (PM) | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Pimco Income Fund CL D | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Anesthesia 401k ⇒ Weyerhaeuser Company (WY) | SP | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Farm LLC, 100% Interest | JT | \$500,001 - \$1,000,000 | Farming Operations | \$1 - \$200 | \$2,501 - \$5,000 |
| LOCATION: Wonewon/Juneau, WI, US DESCRIPTION: 210 acre Organic and Conventional Farm | | | | | |
| Kaynick Solutions 401k ⇒ Alcoa Inc. (AA) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Altria Group, Inc. (MO) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Bank of America Corporation (BAC) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Chesapeake Energy Corporation (CHK) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Eaton Corporation, PLC Ordinary Shares | | \$1,001 - \$15,000 | Tax-Deferred | None | None |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|----------------------|----------------|-------------------------------|-----------------------|
| (ETN) | | | | | |
| Kaynick Solutions 401k ⇒ Fidelity Cash Reserves | | \$50,001 - \$100,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Fidelity Floating Rate High Income | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Fidelity Strategic Income | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Fidelity Value Fund | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Fortress Investment Group LLC Class A (FIG) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ General Electric Company (GE) | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Goldman Sachs Group, Inc. (GS) | | \$15,001 - \$50,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Kraft Foods Group, Inc. (KRFT) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Manitowoc Company, Inc. (MTW) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Mondelez International, Inc. - Class A (MDLZ) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Nordstrom, Inc. (JWN) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Potash Corporation of Saskatchewan Inc. (POT) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Kaynick Solutions 401k ⇒ Whole Foods Market, Inc. (WFM) | | \$1,001 - \$15,000 | Tax-Deferred | None | None |
| Vacant Lot | JT | \$15,001 - \$50,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|----------------|----------------|-------------------------------|-----------------------|
| LOCATION: Prairie du Chien/Crawford, WI, US DESCRIPTION: Vacant residential lot | | | | | |

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

SCHEDULE C: EARNED INCOME

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|-----------------------|---------------------|-------------------------------|-----------------------|
| Kaynick Solution LLC | Instructor | \$2,990 | \$12,440 |
| Kaynick Anesthesia SC | Spouse salary | \$32,500 | \$54,886 |
| Kaynick Anesthesia SC | Business Manager | \$2,000 | \$4,800 |
| Kaynick Farms LLC | Farming Operations | \$1,000 | \$3,564 |
| Kaynick Anesthesia SC | Nonpassive Activity | \$20,000 | \$137,744 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-----------------------|---------------|---------------|-----------------------|
| JT | Summit Credit Union | June 2012 | Home Mortgage | \$100,001 - \$250,000 |
| JT | Badger Land Financial | November 2010 | Farm Mortgage | \$100,001 - \$250,000 |
| | CNH Capital | May 2013 | Tractor Loan | \$50,001 - \$100,000 |

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

| |
|--|
| |
|--|

- Annuity (Owner: JT)
DESCRIPTION: Personal Retirement Annuity
- Bank Accounts (100% Interest) (Owner: JT)
LOCATION: US
- Brokerage Account (100% Interest) (Owner: JT)
LOCATION: US
DESCRIPTION: Brokerage account
- Education Account Kaylin Kurtz (Owner: DC)
LOCATION: NH
DESCRIPTION: 529 Plan for Kaylin Kurtz
- Education Account Nicholas Kurtz (Owner: DC)
LOCATION: MA
DESCRIPTION: 529 Plan for Nicholas Kurtz
- IRA for Anthony Kurtz
DESCRIPTION: Traditional and Roth IRA for Anthony Kurtz
- IRA for Kimberly Kurtz (Owner: SP)
DESCRIPTION: Traditional and Roth IRA for Kimberly Kurtz
- Kaynick Anesthesia 401k (Owner: SP)
DESCRIPTION: 401k retirement account for Kimberly Kurtz and SEP-IRA
- Kaynick Solutions 401k
DESCRIPTION: 401k retirement account for Anthony Kurtz

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: Tony Kurtz , 06/13/2014