



Filing ID #10022048

# 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:** 2017  
**Filing Date:** 05/11/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset        | Income Type(s) | Income      | Tx. > \$1,000?           |
|---|-------|-----------------------|----------------|-------------|--------------------------|
| AF IRA ⇒<br>CAPITAL INCOME BUILDER - A (CAIBX) [MF]     |       | \$50,001 - \$100,000  | Tax-Deferred   |             | <input type="checkbox"/> |
| AF IRA ⇒<br>SMALL CAP WORLD FUND - A (SMCWX) [MF]       |       | \$15,001 - \$50,000   | Tax-Deferred   |             | <input type="checkbox"/> |
| AF IRA ⇒<br>THE GROWTH FUND OF AMERICA - A (AGTHX) [MF] |       | \$100,001 - \$250,000 | Tax-Deferred   |             | <input type="checkbox"/> |
| AF IRA ⇒<br>THE INCOME FUND OF AMERICA - A (AMFCX) [MF] |       | \$50,001 - \$100,000  | Tax-Deferred   |             | <input type="checkbox"/> |
| BANK ACCOUNTS ⇒<br>BMO HARRIS BANK [BA]                 |       | \$100,001 - \$250,000 | Interest       | \$1 - \$200 | <input type="checkbox"/> |
| BANK ACCOUNTS ⇒<br>COMMERCE STATE BANK [BA]             |       | \$1,001 - \$15,000    | Interest       | \$1 - \$200 | <input type="checkbox"/> |
| BANK ACCOUNTS ⇒<br>HORICON BANK [BA]                    |       | \$1,001 - \$15,000    | Interest       | \$1 - \$200 | <input type="checkbox"/> |
| FB ROTH IRA ⇒   |       | \$15,001 - \$50,000   | Tax-Deferred   |             | <input type="checkbox"/> |

| Asset  | Owner | Value of Asset        | Income Type(s) | Income          | Tx. > \$1,000?           |
|--|-------|-----------------------|----------------|-----------------|--------------------------|
| FIRST BANK [IH]<br>DESCRIPTION: CASH                                 |       |                       |                |                 |                          |
| INVESTMENTS ⇒<br>CONDOMINIUM [RP]<br>LOCATION: WEST BEND, WI, US     |       | \$15,001 - \$50,000   | Rent           | \$201 - \$1,000 | <input type="checkbox"/> |
| INVESTMENTS ⇒<br>THRIVENT MUTUAL BOND FUND - A [MF]                  |       | \$1,001 - \$15,000    | Dividends      | \$1 - \$200     | <input type="checkbox"/> |
| INVESTMENTS ⇒<br>U.S. Bancorp (USB) [ST]                             |       | \$1,001 - \$15,000    | Dividends      | \$1 - \$200     | <input type="checkbox"/> |
| INVESTMENTS ⇒<br>WHOLE LIFE - STATE OF WISCONSIN LIFE INSURANCE [WU] |       | \$1,001 - \$15,000    | None           |                 | <input type="checkbox"/> |
| WI RETIREMENT ⇒<br>AMERICAN FUNDS EUROPACIFIC GROWTH R6 [MF]         |       | \$50,001 - \$100,000  | Tax-Deferred   |                 | <input type="checkbox"/> |
| WI RETIREMENT ⇒<br>FIDELITY CONTRAFUND [MF]                          |       | \$100,001 - \$250,000 | Tax-Deferred   |                 | <input type="checkbox"/> |
| WI RETIREMENT ⇒<br>VANGUARD INSTITUTIONAL INDEX INSTL PL [MF]        |       | \$100,001 - \$250,000 | Tax-Deferred   |                 | <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

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 AND PENSION PLAN |

**SCHEDULE G: GIFTS**

None disclosed.

**SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS**

| Trip Details                                 |            |            |  |                  | Inclusions                          |                                     |                                     |
|--|------------|------------|--|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Source                                       | Start Date | End Date   | Itinerary  | Days at Own Exp. | Lodging?                            | Food?                               | Family?                             |
| HERITAGE FOUNDATION                          | 02/8/2017  | 02/10/2017 | WASHINGTON, DC - NEW YORK, NY - MILWAUKEE, WI  | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| AMERICAN ISRAELI EDUCATION FOUNDATION (AIEF) | 08/6/2017  | 08/14/2017 | MILWAUKEE, WI - TEL AVIV, ISRAEL - JERUSALEM, ISRAEL - BETHLEHEM, ISRAEL - MILWAUKEE, WI | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

**SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA**

None disclosed.

**SCHEDULE A AND B ASSET CLASS DETAILS**

|   |
|---|
| <ul style="list-style-type: none"> <li>◦ AF IRA<br/>LOCATION: US</li> <li>◦ BANK ACCOUNTS<br/>LOCATION: US</li> <li>◦ FB ROTH IRA</li> <li>◦ INVESTMENTS<br/>LOCATION: US</li> <li>◦ WI RETIREMENT</li> </ul> |
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**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. Glenn S. Grothman , 05/11/2018