



Filing ID #10014170

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Marlin A. Stutzman
Status: Member
State/District: IN03

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2015
Filing Date: 10/24/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ava Laureenne Bridal LLC, 50% Interest	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: Fredericksburg, VA, US DESCRIPTION: Member / spouse each own 25% interest in bridal salon					
College Choice Indiana 529 Plan		\$1,001 - \$15,000	None		<input type="checkbox"/>
LOCATION: IN					
Farmers State Bank account	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Gold		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Gold Investment					
Indiana PERF Retirement Investment Fund		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Asset rolled into Northwestern Mutual Variable Annuity					
Northwestern Mutual - Traditional Variable Annuity IRA (EIF)		\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Indiana Public Employees Retirement Fund to Northwestern Mutual Traditional Variable Annuity IRA (EIF)					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual CSV Whole Life		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Whole Life Insurance Policy					
Northwestern Mutual CSV Whole Life	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Whole Life Insurance Policy					
Roth IRA - Credit Suisse Commodity Strategy		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Emerging Markets Equity		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Equity Income (MSA/T Rowe Price)-B		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Asset is variable fund held in Roth IRA and liquidated in 2015					
Roth IRA - Fidelity VIP ContraFund		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Fidelity VIP MidCap		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Focused Appreciation		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - International Equity		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - International Growth (MSA/Pyramis)		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held by Roth IRA and liquidated in 2015					
Roth IRA - Mid Cap Value (MSA/LoomisSayles)		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Multi Sector Bond		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Roth IRA - Neuberger Berman Socially Responsive		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Research Int'l Core		None	Capital Gains	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Russell Core Bond B		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Russell Global Real Estate Securities		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Select Bond		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA - Small Cap Value		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Roth IRA High Yield Bond		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Asset was held in Roth IRA and liquidated in 2015					
Stutzman Family Home & Farm	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Rental income from farm land adjacent to family home					
Stutzman Farms, LLC		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: White Pigeon, MI, US DESCRIPTION: 25% ownership in family farm in White Pigeon, MI - Proceeds from Sale of farm equipment					
Thrift Savings Plans Fund G		\$1,001 - \$15,000	None		<input type="checkbox"/>
Wells Fargo Bank account	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Indiana Public Employees Retirement Fund, 100% Interest		05/29/2015	E	\$50,001 - \$100,000	
LOCATION: US					
DESCRIPTION: Transferred / rolled over to Northwestern Mutual Variable Annuity					
Roth IRA ⇒ Credit Suisse Commodity Strategy		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Emerging Markets Equity		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Fidelity VIP Contrafund		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Fidelity VIP MidCap		05/29/2015	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Roth IRA ⇒ Focused Appreciation		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ International Equity		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ International Growth		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ MidCap Value		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Multi Sector Bond		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Neuberger Berman Socially Responsive		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Research International Core		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Roth IRA - Equity Income		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Russell Core Bond		05/29/2015	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Roth IRA ⇒ Russell Global Real Estate		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Select Bond		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ Small Cap Value		05/29/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>

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

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Fifth Third Mortgage	February 2011	Mortgage on Virginia Residence	\$500,001 - \$1,000,000
JT	Beacon Credit Union	January 2015	Home Mortgage on farm home and 60 acres of farmland	\$250,001 - \$500,000
JT	Farmers State Bank	July 2015	farm home construction line of credit	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Proprietor	Stutzman Farms
Chairman of the Board	Ave Laureenne, LLC
Member	Stutzman Farms, LLC (Michigan)

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2002	Self / State of Indiana	Public Employee/ Legislative Retirement Fund for Service in State Legislature

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?
Club for Growth	02/27/2015	02/28/2015	Washington DC - Palm Beach Florida - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Aspen Institute Congressional Program	03/27/2015	04/3/2015	Washington DC - Berlin Germany - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The Heritage Foundation	01/28/2015	01/30/2015	Washington DC - Middleburg VA - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ConservAmerica	04/10/2015	04/10/2015	Detroit MI - Dallas TX - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Club for Growth	10/15/2015	10/16/2015	Indianapolis IN - San Diego CA - Indianapolis, IN	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

o Roth IRA

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. Marlin A. Stutzman , 10/24/2016