



Filing ID #10031039

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Ms. Lynn Afendoulis
Status: Congressional Candidate
State/District: MI03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 11/17/2019
Period Covered: 01/01/2018– 10/31/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Legacy Trust Stock [PS] DESCRIPTION: Board compensation		\$15,001 - \$50,000	Dividends	None	None
RJ IRA ⇒ AB Large Cap Growth FD Advisor Class [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Blackrock Heath Sciences Opportunities Port Inst. CL (SHSSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Cohen & Steers Real Estate Securities Fund Class I (CSDIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Easton Vance Atlanta Capital SMID Cap Fund Class I (EISMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Fidelity Advisor Materials (FMFEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RJ IRA ⇒ Invesco Oppenheimer Development Markets Fund Class Y N/L [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ JP Morgan Small Cap Equity Fund (VSEIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Oakmark Fund Investor Class N/L (OAKIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Oakmark International Fund (OAKIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ Victory Sycamore Established Value Fund (VEVIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
RJ IRA ⇒ YMG Yacktman Fund Class I N/L (YACKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
UFP 401K ⇒ AB Small Cap Value Portfolio SCYVX [MF]		\$1,001 - \$15,000	Tax-Deferred		
UFP 401K ⇒ Alger Weatherbie Specialized Growth Fund ASYM [MF]		\$1,001 - \$15,000	Tax-Deferred		
UFP 401K ⇒ AMG GW&K Trilogy Emerging Markets Equity Fund TLESX [MF]		\$15,001 - \$50,000	Tax-Deferred		
UFP 401K ⇒ Goldman Sachs Emerging Markets Debt Fund GSDIX [MF]		None	Tax-Deferred		
UFP 401K ⇒ Harbor Capital Appreciation Fund HACAX [MF]		\$50,001 - \$100,000	Tax-Deferred		
UFP 401K ⇒ Hartford Midcap Fund HMDYX [MF]		\$1,001 - \$15,000	Tax-Deferred		
UFP 401K ⇒ JP Morgan Core Bond Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
UFP 401K ⇒		\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Oakmark Fund OAKMX [MF]		\$100,000			
UFP 401K ⇒ SDIT Government Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UFP 401K ⇒ TransamericanMid Cap Value Opportunities [MF]		\$1,001 - \$15,000	Tax-Deferred		
UFP 401K ⇒ Universal Forest Products, Inc. (UFPI) [ST]		\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
UFP 401K ⇒ Vanguard Short-Term Investment Grade Fund VFSUX [MF]		\$15,001 - \$50,000	Tax-Deferred		
UFP 401K ⇒ WCM Focused International Growth Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
UFP 401K ⇒ Western Asset Income Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Universal Forest Products, Inc. (UFPI) [ST]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

* 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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Universal Forest Products	Salary	\$120,493.55	\$216,489.54
State of Michigan	Salary	\$56,066.09	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Legacy Trust

Position	Name of Organization
Board Member	Grand Rapids Area Chamber of Commerce
Board Member	Economic Club of Grand Rapids
Commissioner	Michigan Transportation Commission

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- RJ IRA
- UFP 401K
DESCRIPTION: Former UFP 401k, moved to Legacy Trust

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

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: Ms. Lynn Afendoulis , 11/17/2019