



Filing ID #10034702

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Lisa McClain
Status: Congressional Candidate
State/District: MI10

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 03/6/2020
Period Covered: 01/01/2019– 02/28/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab 401K ⇒ Polen Capital Growth [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
Charles Schwab Brokerage Account ⇒ Polen Capital Growth [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	None	None
Congress Asset Management Company ⇒ Congress Mid Cap Growth Fund [OT] DESCRIPTION: Coverdell ESA	DC	\$15,001 - \$50,000	Tax-Deferred		
Hantz Checking Account [BA]	JT	\$250,001 - \$500,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Hantz Group [PS] DESCRIPTION: Financial services company	SP	\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Hantz Group [PS] DESCRIPTION: financial services company		\$1,000,001 - \$5,000,000	Dividends	\$50,001 - \$100,000	\$100,001 - \$1,000,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Hantz Holdings [PS]	SP	\$500,001 - \$1,000,000	Dividends	\$100,001 - \$1,000,000	None
DESCRIPTION: Financial services company					
Hantz Holdings [PS]		\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	None
DESCRIPTION: financial services company					
Mass Mutual 401K ⇒ American Century Mid Cap Value [MF]		\$15,001 - \$50,000	Tax-Deferred		
Mass Mutual 401K ⇒ Clearbridge Large Cap Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
Mass Mutual 401K ⇒ Clearbridge Mid Cap Growth [MF]		\$15,001 - \$50,000	Tax-Deferred		
Mass Mutual 401K ⇒ Eaton Vance Atlanta Cap [MF]		\$15,001 - \$50,000	Tax-Deferred		
Mass Mutual 401K ⇒ Invesco Comstock Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Mass Mutual 401K ⇒ Janus Henderson Triton [MF]		\$15,001 - \$50,000	Tax-Deferred		
Mass Mutual 401K ⇒ JP Morgan US Equity Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
Mass Mutual 401K ⇒ MM Russel 2000 Small Cap Index [MF]		\$15,001 - \$50,000	Tax-Deferred		
Mass Mutual 401K ⇒ Seligman Mid Cap Growth Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Mass Mutual 401K ⇒ Victory Integrity Small Cap Value [MF]		\$50,001 - \$100,000	Tax-Deferred		
Mass Mutual 401K (Spouse) ⇒ 401(k) Clearbridge Large Cap Growth Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
Mass Mutual 401K (Spouse) ⇒ Janus Henderson Triton Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Mass Mutual 401K (Spouse) ⇒ MM Russel 2000 Small Cap Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Mass Mutual 401K (Spouse) ⇒ MM S&P 500 Index [MF]		\$50,001 - \$100,000	Tax-Deferred		
Mass Mutual 401K (Spouse) ⇒ MM S&P Mid Cap Index Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
Mass Mutual 401K (Spouse) ⇒ Victory Integrity Small Cap Value [MF]		\$50,001 - \$100,000	Tax-Deferred		
Nationwide Variable Universal Life [WU]	SP	\$100,001 - \$250,000	None		
Nuveen Michigan Muni Fund [MF]	JT	\$100,001 - \$250,000	Dividends, Interest	\$2,501 - \$5,000	None

* 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
HANTZ FINANCIAL SERVICES	SALARY	\$105,000.00	\$105,000.00
HANTZ FINANCIAL SERVICES	Spouse Salary	N/A	N/A
EHE	Salary	\$12,500.00	\$125,000.00
Hantz Associates	Salary	\$410,000.00	N/A

SCHEDULE D: LIABILITIES

None disclosed.

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

- Charles Schwab 401K (Owner: SP)
- Charles Schwab Brokerage Account (Owner: JT)
LOCATION: US
- Congress Asset Management Company (Owner: DC)
LOCATION: MI, US
DESCRIPTION: Coverdell Education Savings Account
- Mass Mutual 401K
- Mass Mutual 401K (Spouse) (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

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: Lisa McClain , 03/6/2020