



Filing ID #10052878

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Nikki Budzinski
Status: Member
State/District: IL13

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2022
Filing Date: 05/31/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Budzinski & Partners LLC ⇒ Business Checking Account [BA]		\$1,001 - \$15,000	None		
Budzinski & Partners LLC ⇒ Business Savings Account [BA]		\$1 - \$1,000	Interest	Not Applicable	\$1 - \$200
Individual Single Account ⇒ American Balanced A (ABALX) [MF]		\$1,001 - \$15,000	None		
Individual Single Account ⇒ AMERICAN CAP WRLD GRW & INC A (CWGIX) [MF]		\$1,001 - \$15,000	None		
Individual Single Account ⇒ AMERICAN FUNDAMENTAL INV A (ANCFX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Individual Single Account ⇒ AMERICAN GROWTH FD OF AMER A (AGTHX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Individual Single Account ⇒ AMERICAN NEW ECONOMY A (ANEFX) [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual Single Account ⇒ AMERICAN NEW PERSPECTIVE A (ANWPX) [MF]		\$1,001 - \$15,000	None		
Individual Single Account ⇒ AMERICAN WASH MUTUAL INV A (AWSHX) [MF]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Individual Single Account ⇒ Cash [BA]		\$1 - \$1,000	Interest	Not Applicable	\$1 - \$200
Individual Single Account ⇒ JH FNDM LARGE CAP CORE A (TAGRX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Individual Single Account ⇒ JPMORGAN EQUITY INCOME A (OIEIX) [MF]		\$1,001 - \$15,000	None		
Individual Single Account ⇒ JPMORGAN LARGE CAP GROWTH A (OLGAX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Individual Single Account ⇒ JPMORGAN MID CAP EQUITY A (JCMAX) [MF]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Individual Single Account ⇒ JPMORGAN SMALL CAP BLEND A (VSCOX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Individual Single Account ⇒ LAKE CNTY IL SCH DIST GO (LAKECOSCH33Z34) [GS]		\$1,001 - \$15,000	Interest	Not Applicable	\$201 - \$1,000
DESCRIPTION: Maturity date 12/1/2034					
JP Morgan Chase Bank Accounts [BA]		\$50,001 - \$100,000	Interest	Not Applicable	\$1 - \$200
Rental Property [RP]		\$250,001 - \$500,000	Rent	Not Applicable	\$5,001 - \$15,000
LOCATION: Chicago/Cook, IL, US					
Roth IRA-1 ⇒ AMERICAN AMCAP A (AMCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA-1 ⇒ AMERICAN CAP WRLD GRW & INC A (CWGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA-1 ⇒ AMERICAN FUNDAMENTAL INV A (ANCFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA-1 ⇒ American Funds Investment Company of America Class A (AIVSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA-1 ⇒ American Funds SMALLCAP World Fund Class C (SWCWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA-1 ⇒ AMERICAN GROWTH FD OF AMER A (AGTHX) [MF] DESCRIPTION: sold		None	Tax-Deferred		
Roth IRA-1 ⇒ AMERICAN NEW WORLD A (NEWFX) [MF] DESCRIPTION: sold		None	Tax-Deferred		
Roth IRA-1 ⇒ HARTFORD CAP APPRECIATION A (ITHAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA-1 ⇒ INVESCO COMSTOCK A (ACSTX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
State Employees' Retirement System of Illinois [DB]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN AMCAP A (AMCPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN CAP WRLD GRW & INC A (CWGIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN EUROPACIFIC GROWTH A (AEPGX) [MF]		None	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN FUNDAMENTAL INV A (ANCFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN HIGH-INCOME TRUST A (AHITX) [MF]		\$1 - \$1,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN INC FUND OF AMER A (AMECX) [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA-1 ⇒ AMERICAN INVEST CO OF AMER A (AIVSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN NEW ECONOMY A (ANEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN NEW PERSPECTIVE A (ANWPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN SMALLCAP WORLD A (SMCWX) [MF]		None	Tax-Deferred		
Traditional IRA-1 ⇒ AMERICAN WASH MUTUAL INV A (AWSHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ JPMORGAN LARGE CAP GROWTH A (OLGAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ JPMORGAN MID CAP EQUITY A (JCMAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ JPMORGAN MID CAP GROWTH A (OSGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-1 ⇒ JPMORGAN MID CAP VALUE A (JAMCX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-1 ⇒ JPMORGAN SMALL CAP BLEND A (VSCOX) [MF]		None	Tax-Deferred		
Traditional IRA-1 ⇒ JPMorgan U.S. Value Fund Class A (VGRIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN AMCAP A (AMCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN BALANCED A (ABALX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN CAPITAL WORLD BOND A (CWBFX) [MF]		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA-2 ⇒ American Funds The Bond Fund of America Class A (ABNDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN GROWTH FD OF AMER A (AGTHX) [MF]		None	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN HIGH-INCOME TRUST A (AHITX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN INVEST CO OF AMER A (AIVSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN NEW ECONOMY A (ANEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN SMALLCAP WORLD A (SMCWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA-2 ⇒ AMERICAN WASH MUTUAL INV A (AWSHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA-2 ⇒ JPMORGAN MID CAP EQUITY A (JCMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
United Food and Commercial Worker International Union Pension Plan [DB]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Bank Accounts [BA]		\$1 - \$1,000	Interest	Not Applicable	\$1 - \$200

* 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
Budzinski & Partners, LLC	Consulting	N/A	\$120,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Middletown State Bank	October 2021	Mortgage on personal residence	\$250,001 - \$500,000
	PNC Bank	April 2019	Mortgage on rental property	\$250,001 - \$500,000
COMMENTS: Paid in full May 2022				

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2008	United Food and Commercial Worker International Union Pension Plan for Employees	Employee Pension Plan
March 2000	State Employees' Retirement System of Illinois	Employee Pension System

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

Source (Name and Address)	Brief Description of Duties
Climate Jobs National Resource Center (New York, NY, US)	Consulting Services

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">Budzinski & Partners LLC LOCATION: USIndividual Single AccountRoth IRA-1Traditional IRA-1Traditional IRA-2
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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: Hon. Nikki Budzinski , 05/31/2023