



Filing ID #10059325

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Jessica Swartz  
**Status:** Congressional Candidate  
**State/District:** MI04

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 05/3/2024  
**Period Covered:** 01/01/2023– 04/15/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Gerber Grow Up Plan [WU]	DC	\$1,001 - \$15,000	None		
Jessica Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Jessica Life Insurance [WU]		\$1,001 - \$15,000	None		
DESCRIPTION: State Farm Life Insurance for Jessica					
LMSB 529 ⇒ DC 529 Tuition Plan [5P]		\$1,001 - \$15,000	None		
LOCATION: DC DESCRIPTION: DC Savings Plan					
Modern Woodmen [WU]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Life Insurance					
Retirement accounts ⇒ CREF Social Choice R2 (QCSCPX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: WESTERN MICHIGAN UNIVERSITY 403(B) TAX DEFERRED ANNUITY PLAN					
Retirement accounts ⇒ CREF Stock R2 (QCSTPX) [MF]		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ CREF Stock R2 (QCSTPX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ Fidelity Emerging Markets Index (FPADX) [MF]		\$1 - \$1,000	None		
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ Schwab International Index (SWISX) [MF]		\$1 - \$1,000	None		
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ Schwab Small Cap Index (SWSSX) [MF]		\$1 - \$1,000	None		
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ Schwab Total Stock Market Index (SWTSX) [MF]		\$1,001 - \$15,000	None		
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ TIAA Real Estate [MF]		\$1,001 - \$15,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA Real Estate (QREARX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA Traditional [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA Traditional [MF]		\$1,001 - \$15,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA Traditional [IH]		\$1 - \$1,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA Traditional [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF Bond Index Fund - Retirement Class (TBIRX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF Bond Index Fund - Retirement Class (TBIRX) [IH]		\$1 - \$1,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF Emerging Markets Equity Index Fund - Retirement Class (TEQSX) [IH]		\$1 - \$1,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF Emerging Markets Equity Index Fund - Retirement Class (TEQSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF Equity Index Fund - Retirement Class (TIQRX) [IH]		\$1 - \$1,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF International Equity Index Fund - Retirement Class (TRIEX) [IH]		\$1 - \$1,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF International Equity Index Fund - Retirement Class (TRIEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF Large-Cap Growth Index Fund - Retirement Class (TRIRX) [IH]		\$1 - \$1,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF Large-Cap Value Index Fund - Retirement Class (TRCVX) [IH]		\$1 - \$1,000	None		
DESCRIPTION: Jamie's TIAA Account					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ TIAA-CREF Large-Cap Value Index Fund - Retirement Class (TRCVX) [MF]  DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ TIAA-CREF S&P 500 Index Fund - Retirement Class (TESHX) [IH]  DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF S&P 500 Index Fund - Retirement Class (TRSPX) [MF]  DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ TIAA-CREF Short-Term Bond Index Fund - Retirement Class (TESHX) [MF]  DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ TIAA-CREF Short-Term Bond Index Fund - Retirement Class (TESHX) [IH]  DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF Small-Cap Blend Index Fund - Retirement Class (TRBIX) [IH]  DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF Small-Cap Blend Index Fund - Retirement Class (TRBIX) [MF]  DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Vanguard Mid-Cap Growth Index Admiral (VMGMX) [MF]  DESCRIPTION: Miller Johnson Retirement Account		\$1 - \$1,000	None		
Retirement accounts ⇒ Vanguard Real Estate Index Admiral (VGSLX) [MF]  DESCRIPTION: Miller Johnson Retirement Account		\$1 - \$1,000	None		
Retirement accounts ⇒ Vanguard Short-Term Inflation-Protected Security Index		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Admiral (VTAPX) [MF]					
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ Vanguard Small Cap Growth Index Admiral (VSGAX) [MF]		\$1 - \$1,000	None		
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ Vanguard Small Cap Value Index Admiral (VSIAX) [MF]		\$1 - \$1,000	None		
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: MICHIGAN STATE UNIVERSITY 403(B) BASE RETIREMENT PROGRAM					
Retirement accounts ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: MICHIGAN STATE UNIVERSITY 403(B) SUPPLEMENTAL RETIREMENT PROGRAM					
Retirement accounts ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: WESTERN MICHIGAN UNIVERSITY 403(B) RETIREMENT PLAN					
Retirement accounts ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: WESTERN MICHIGAN UNIVERSITY 403(B) TAX DEFERRED ANNUITY PLAN					
Retirement accounts ⇒ Vanguard Total Bond Market Index Fund Admiral (VBTIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ Western Asset Core Plus Bond Fund Class IS (WAPBX) [MF]		\$1,001 - \$15,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ Western Asset Core Plus Bond Fund Class IS (WAPBX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: WESTERN MICHIGAN UNIVERSITY 403(B) RETIREMENT PLAN					
Solana [CT]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Solana crypto currency					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Spouse Bank Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

\* Investment vehicle 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
Western Michigan University	spouse salary	N/A	N/A
Michigan State University	salary	\$.00	\$43,466.68
Miller Johnson	salary	\$37,301.99	\$74,017.39

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Michigan State University Federal Credit Union	August 2023	personal loan to consolidate debt at lower interest rate	\$10,000 - \$15,000

### 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 INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"> <li>LMSB 529 LOCATION: DC</li> <li>Retirement accounts</li> </ul>
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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:** Jessica Swartz , 05/3/2024