



Filing ID #10053075

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Scott Fitzgerald
Status: Member
State/District: WI05

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 05/5/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Catalyst/Millburn Hedge Strategy Fund Class A [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab Family of Funds Value Advantage Money Fund Invest [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Davis New York Venture Fund A [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Dry Head Ranch, 100% Interest [FA] LOCATION: Big Horn, MT, US DESCRIPTION: House and Land	JT	\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Fidelity MSCI Health Care Index ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity MSCI Industrial Index ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
First Trust Financials AlphaDEX Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
FlexShares High Yield Value-Scored US Bond Index Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Greenwich Ivy Long-Short Fund [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Invesco American Franchise Fund Class A [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Invesco S&P 500 Equal Weight Industrials (RGI) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Investco NASDAQ 100 ETF [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Investco S&P 500 Revenue ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Semiconductor ETF (SOXX) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPMorgan Equity Premium Income ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Massachusetts Investors Growth Stock Fund Class A [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mercator International Opportunity Fund Institutional Class [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
One Oak Farm, 100% Interest [FA] LOCATION: Juneau, WI, US DESCRIPTION: Home and Farm field rent	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Pacer US Cash Cows 100 ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Putnam International Equity FD Class A [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Putnam Sustainable Leaders Fund Class A [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Schwab US Dividend Equity ETF (SCHD) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SPDR Portfolio High Yield Bond ETF (SPHY) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SPDR Portfolio S&P 600 Small Cap ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SPDR Russell 1000 Yield Focus ETF (ONEY) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SPDR S&P Regional Banking ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Growth ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard S&P 500 ETF [EF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Voya Global High Dividend Low Volatility Fund Class A [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wisdom Tree Cloud Computing Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Horicon State Bank	12/2013	mortgage	\$250,001 - \$500,000
JT	Bank of Powell	07/2015	mortgage	\$100,001 - \$250,000
JT	FedLoan Parent Plus	11/2011	Son student loab	\$15,001 - \$50,000
JT	Truist Bank	07/2021	car loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1995	State of Wisconsin and self	Participation in the State of Wisconsin Deferred Compensation Program and Pension Plan

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Scott Fitzgerald , 05/5/2023