



Filing ID #10049564

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Ann Kirkpatrick
Status: Member
State/District: AZ02

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 05/29/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--------------------------------------------------------------------------------------------------------------------------------------|-------|-----------------------|----------------|-------------------|--------------------------|
| Curley Law Firm PLLC Partnership Interest [OL] LOCATION: Phoenix/Maricopa, AZ, US DESCRIPTION: Interest in Law Partnership | SP | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Edward Jones IRA ⇒ Cash [IH] | | \$50,001 - \$100,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Edward Jones IRA ⇒ SPDR S&P 500 ETF TR UNIT SERIES I S&P DEPOSITORY [MF] | | \$100,001 - \$250,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Edward Jones ROTH IRA ⇒ Cash [IH] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Edward Jones ROTH IRA ⇒ iShares S&P 500 Index Fund [MF] | | \$100,001 - \$250,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Fidelity IRA ⇒ Cash [IH] | SP | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Fidelity IRA ⇒ Fidelity NASDAQ Composite Index [MF] | SP | \$250,001 - \$500,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|-----------------------------------------------------------------------------|-------|---------------------------|-----------------------------|--------------------|-------------------------------------|
| Fidelity IRA ⇒ Spartan Total Market Index Fund Adv Class [MF] | SP | \$1,000,001 - \$5,000,000 | Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Penn Mutual Whole Life Insurance [WU] | SP | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Vanguard Investments ⇒ Vanguard 500 Index Fund Admiral Shares [MF] | JT | \$50,001 - \$100,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Vanguard Investments ⇒ Vanguard Total Stock Market Index Fund [MF] | JT | \$50,001 - \$100,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | <input checked="" type="checkbox"/> |
| Wells Fargo Bank Accounts [BA] | JT | \$15,001 - \$50,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Wells Fargo IRA ⇒ Cash [IH] | SP | \$50,001 - \$100,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Wells Fargo SIMPLE IRA ⇒ Cash [IH] | JT | \$250,001 - \$500,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Wells Fargo SIMPLE IRA ⇒ Wells Fargo Advantage Emerging Growth Fund [MF] | JT | \$1,001 - \$15,000 | Capital Gains | \$2,501 - \$5,000 | <input type="checkbox"/> |

* 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 B: TRANSACTIONS

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|-----------------------------------------------------------------------------|-------|------------|----------------|--------------------|-------------------------------------|
| Vanguard Investments ⇒ 500 Index Funds Admiral Shares [MF] | JT | 04/19/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Vanguard Investments ⇒ Total Stock Market Index Fund Admiral Shares [MF] | JT | 04/19/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Vanguard Investments ⇒ Total Stock Market Index Fund Admiral Shares [MF] | JT | 05/7/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |

* 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

None disclosed.

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-----------------------------------|----------------|---------------------------------|-----------------------|
| JT | Wells Fargo Bank | May 2012 | Mortgage on Flagstaff residence | \$100,001 - \$250,000 |
| JT | Wells Fargo Bank Visa Credit Card | Various | Credit card charges | \$15,001 - \$50,000 |
| JT | Wells Fargo Bank | Dec 2017 | Mortgage on Phoenix condo | \$250,001 - \$500,000 |
| JT | Discover | September 2020 | Credit card advance | \$15,001 - \$50,000 |
| JT | On Q Financial | June 2019 | Mortgage on Prescott property | \$250,001 - \$500,000 |
| JT | Bank of America Visa Cards | March 2020 | Credit card advance | \$15,001 - \$50,000 |

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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.

SCHEDULE A AND B ASSET CLASS DETAILS

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|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none">◦ Edward Jones IRA◦ Edward Jones ROTH IRA◦ Fidelity IRA (Owner: SP)◦ Vanguard Investments (100% Interest) (Owner: JT) LOCATION: US◦ Wells Fargo IRA (Owner: SP) |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

- Wells Fargo SIMPLE IRA (Owner: JT)

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. Ann Kirkpatrick , 05/29/2022