



Filing ID #10062947

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Dr. Amish Shah
Status: Congressional Candidate
State/District: AZ01

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2023
Filing Date: 09/29/2024
Period Covered: 01/01/2022– 07/14/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameritrade Roth IRA ⇒ Cash [BA]		\$50,001 - \$100,000	None		
Ameritrade Roth IRA ⇒ Fidelity® 500 Index Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		
Ameritrade Roth IRA ⇒ Vanguard International Growth Fund Investor Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ameritrade Roth IRA ⇒ Vanguard Mid-Cap ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ameritrade Roth IRA ⇒ Vanguard Small-Cap Growth ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
AMS Emergency Services, LLC [OL]		Undetermined	None		
LOCATION: Phoenix, AZ, US					
DESCRIPTION: AMS Medical Services is a single member LLC that is a medical staffing business.					
COMMENTS: AMS itself does NOT generate income and is a pass through for the income reported in Schedule C under TEC AZ Physician services.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Business Ownership ⇒ ReferWell [PS]		\$1 - \$1,000	None		
DESCRIPTION: ReferWell is a small medical referral startup.					
Fidelity Elective ⇒ Fidelity Contrafund Fund [MF]		\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
Fidelity Elective ⇒ Fidelity Government Money Market Fund [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Fidelity Elective ⇒ iShares S&P Mid-Cap 400 Value ETF [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity Elective ⇒ SPDR S&P 500 ETF Trust [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity Roth IRA ⇒ Fidelity Low-Priced Stock Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HHC 403b (Prudential) ⇒ American Funds EuroPacific Growth Fund® Class R-5 [MF]		\$15,001 - \$50,000	Tax-Deferred		
HHC 403b (Prudential) ⇒ BlackRock Mid-Cap Growth Equity Portfolio Institutional Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		
HHC 403b (Prudential) ⇒ ClearBridge Small Cap Growth Fund Class A [MF]		\$1 - \$1,000	Tax-Deferred		
LEK401k ⇒ Invesco International Small-Mid Company Fund Class R6 [MF]		\$15,001 - \$50,000	Tax-Deferred		
LEK401k ⇒ PGIM High Yield Fund- Class R6 [MF]		\$15,001 - \$50,000	Tax-Deferred		
Nationwide AZ 401A ⇒ Vanguard Extended Market Index Fund Admiral Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
Nationwide AZ 401A ⇒ Vanguard Total International Stock Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Optum ⇒ Optum - Cash Account [BA]		\$1 - \$1,000	None		
Optum ⇒ Vanguard Small-Cap Index Fund Admiral Shares [MF]		\$1,001 - \$15,000	None		
Sinai 403b (TIAA-Cref) ⇒ Vanguard Explorer Fund Admiral Shares MUTF: VEXRX [MF]		\$100,001 - \$250,000	Tax-Deferred		
Sinai 403b (TIAA-Cref) ⇒ Vanguard International Growth Fund Admiral Shares [MF]		\$50,001 - \$100,000	Tax-Deferred		
Sinai 403b (TIAA-Cref) ⇒ Vanguard International Value Fund Investor Shares [MF]		\$50,001 - \$100,000	Tax-Deferred		
Sinai 403b (TIAA-Cref) ⇒ Vanguard PRIMECAP Fund Admiral Shares [MF]		\$100,001 - \$250,000	Tax-Deferred		
Sinai 403b (TIAA-Cref) ⇒ Vanguard Target Retirement 2040 Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		
Sinai 403b (TIAA-Cref) ⇒ Vanguard Target Retirement 2050 Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
SWT, LLC [OL] LOCATION: Glendale, AZ, US DESCRIPTION: joint publishing venture COMMENTS: Entity has been inactive for several years and in process of being dissolved.		None	None		
Vanguard 401k ⇒ Vanguard Explorer Fund Investor Class [MF]		\$500,001 - \$1,000,000	Tax-Deferred		

* 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
Mayo Clinic Arizona	Salary	\$93,670.00	\$137,441.04

Source	Type	Amount Current Year to Filing	Amount Preceding Year
TEC AZ Physicians	Salary	\$17,740.00	\$104,435.00
State of Arizona	State Representative - Salary	\$20,363.04	\$28,483.82

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Arizona College of Emergency Physicians
Board Member	La Gattara Cat Cafe

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">◦ Ameritrade Roth IRA◦ Business Ownership LOCATION: US◦ Fidelity Elective LOCATION: US◦ Fidelity Roth IRA◦ HHC 403b (Prudential)◦ LEK401k◦ Nationwide AZ 401A DESCRIPTION: AZ State Retirement Fund◦ Optum LOCATION: US DESCRIPTION: Health Savings Account◦ Sinai 403b (TIAA-Cref)◦ Vanguard 401k

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

COMMENTS

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: Dr. Amish Shah , 09/29/2024