



Filing ID #10046402

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. John Curtis
Status: Member
State/District: UT03

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 08/13/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
1260 West 1650 North, Springville UT (Loan) [RP] LOCATION: Springville, UT, US		None	Capital Gains	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
2120 North 400 East [RP] LOCATION: North Ogden, UT, US		\$1,000,001 - \$5,000,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Action Opportunity Fund [RP] LOCATION: Provo, UT, US		\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
AmBank Checking Account [BA] Ameritrade ⇒ Invesco QQQ Trust (QQQ) [EF]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Ameritrade ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameritrade ⇒ ProShares UltraPro Dow30 (UDOW) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameritrade ⇒ SPDR Dow Jones Industrial Average ETF Trust (DIA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameritrade ⇒ Zoom Video Communications, Inc. - Class A (ZM) [ST]		\$15,001 - \$50,000	None		<input type="checkbox"/>
ATI Founders, Inc. (shooting range equipment) - [OL] LOCATION: Provo, UT, US DESCRIPTION: Shooting range equipment		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Bear Lake Rental #7, 2176 S. Bear Lake Blvd. [RP] LOCATION: Garden City, UT, US		\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	<input type="checkbox"/>
Curtis Family Georgetown Condo, LLC, 395 West 4650 North [RP] LOCATION: Provo, UT, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Curtis Family Trust ⇒ 786 S 1600 W Street [RP] LOCATION: Provo, UT, US		None	Capital Gains	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Curtis Family Trust ⇒ Parcel #16-044-0006 [RP] LOCATION: Weber County, UT, US		\$250,001 - \$500,000	None		<input type="checkbox"/>
Curtis Family Trust ⇒ Parcel #9-8-19-13 [RP] LOCATION: Kane County, UT, US		None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Curtis Family Trust ⇒ Vacant Lot [RP] LOCATION: Brighton, UT, US		\$1 - \$1,000	None		<input type="checkbox"/>
Curtis Family Trust ⇒ Zions Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Curtis Family Trust ⇒ Zions Bank Money Market Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Domo, Inc. - Class B (DOMO) [ST]		\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Influence Int'l Inc. - business relationship development services - Provo, UT [PS] DESCRIPTION: Business relationship development services		\$15,001 - \$50,000	None		<input type="checkbox"/>
John Reem Curtis, 800 S Center SPE, LLC [RP] LOCATION: North Ogden, UT, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Monticello Development Company, LLC - unimproved land [RP] LOCATION: Monticello, UT, US		\$50,001 - \$100,000	None		<input type="checkbox"/>
Northwestern Mutual ⇒ AGG - iShares Core US Aggregate Bond [HE]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual ⇒ Cohen & Steers Real Estate Securities Fund Class I [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual ⇒ DODIX - Dodge & Cox Income Fund [MF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Northwestern Mutual ⇒ DODIX - DODGE & COX INCOME FUND [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual ⇒ IAU - iShares Gold Trust [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual ⇒ IEFA - iShares Core MSCI EAFE [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ IEMG - iShares Core MSCI Emerging Markets [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Northwestern Mutual ⇒ IJR - iShares Core S&P Small-Cap [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual ⇒ iShares Inc. MSCI Eurozone ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual ⇒ IVV - iShares Core S&P 500 [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ PCLPX - PIMCO COMMODITIES PLUS STRATEGY FUND CLASS I-2 [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual ⇒ PFP MX - Parnassus Mid Cap Fund Instl Class [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual ⇒ PIFZX - PGIM Short-Term Corporate Bond Fund Class Z [HE]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual ⇒ TIP - iShares Trust TIPS Bond [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual ⇒ VBT LX - VANGUARD TOTAL BD MKT IDX FUND [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual ⇒ VNQ - Vanguard Real Estate Index Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual ⇒ VO - Vanguard Mid-Cap Index Fund [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Abbott Laboratories (ABT) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Adobe Inc. (ADBE) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ AGG - iShares Core US Aggregate Bond [EF]	JT	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ ALLEGHENY CNTY PA GO BDS C-69 5.000% 12/01/25 B/E DTD 10/11/12 CLB CLB 12/01/22 @100.000 [CS] DESCRIPTION: Alleghany County, Pennsylvania	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	JT	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Amazon.com, Inc. (AMZN) [ST]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Express Company (AXP) [ST]					
Northwestern Mutual - Joint ⇒ Anthem, Inc. (ANTM) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Apple Inc. (AAPL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Applied Materials, Inc. (AMAT) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Bank of America Corporation (BAC) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ BlackRock, Inc. (BLK) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Boston Scientific Corporation (BSX) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ CALIFORNIA ST GO VAR PURP REF BDS 4.000% 03/01/37 B/E DTD [CS] DESCRIPTION: California	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ CALIFORNIA ST UNIV REV BDS 2018 A 5.000% 11/01/35 B/E [CS] DESCRIPTION: California	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Caterpillar, Inc. (CAT) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Chevron Corporation (CVX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Citigroup, Inc. (C) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ COLO-NESCO CMNTY SCHDIST IOWA GO BDS 2020 3.000% 06/01/31 [CS] DESCRIPTION: Colo-Nesco Community School District, Iowa	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Colorado Springs Colo Utils Rev Util Sys Ref Rev Bds 2012B 5.000% 11/15/24 B/E [CS] DESCRIPTION: Colorado Springs, CO					
Northwestern Mutual - Joint ⇒ COLORADO ST CTFS PARTN RURAL COPS 2020 A 4.000% 12/15/37 [CS] DESCRIPTION: Colorado	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Comcast Corporation - Class A (CMCSA) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ ConocoPhillips (COP) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Constellation Brands, Inc. (STZ) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Costco Wholesale Corporation (COST) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ CSX Corporation (CSX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Danaher Corporation (DHR) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Deere & Company (DE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ EASTERN HOWARD IND THIRD MILLENNIUM SCH BLDG CORP AD VALOREM PPTY TAX FIRST MTG 4.000% 07/15/33 [CS] DESCRIPTION: Howard County, IN	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Facebook, Inc. - Class A (FB) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Fiserv, Inc. (FISV) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ FLORIDA ST BRD ED PUB ED OUTLAY REF BDS [CS] DESCRIPTION: Florida	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ General Municipal Mny Mkt Cl A [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ GEORGIA ST GO BDS 2021 A 4.000% 07/01/34 [CS] DESCRIPTION: Georgia	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Goldman Sachs International Small Cap Insights Fund (GICIX) [MF]	JT	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ HENDERSON COUNTY NC LTD OBLIG BDS 2020 4.000% 06/01/34 B/E DTD [CS] DESCRIPTION: Henderson County, NC	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ HENNEPIN CNTY MINN GO SALES TAX REV BDS 2019 B 5.000% 12/15/39 B/E [CS] DESCRIPTION: Hennepin County, MN	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Hilton Worldwide Holdings Inc. (HLT) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Home Depot, Inc. (HD) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Honeywell International Inc. (HON) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IAU - iShares Gold Trust [EF]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IEFA - iShares Core MSCI EAFE [EF]	JT	\$250,001 - \$500,000	Capital Gains	\$5,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IEMG - iShares Core MSCI Emerging Markets [EF]	JT	\$100,001 - \$250,000	Capital Gains	\$2,501 - \$5,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IJR - iShares Core S&P Small-Cap [EF]	JT	\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ INDIANA ST FIN AUTH WASTEWATER UTIL REV FIRST	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LIEN REF BDS CWA AUTHORITY INC 4.000% 10/01/36 [CS] DESCRIPTION: Indiana					
Northwestern Mutual - Joint ⇒ Intercontinental Exchange Inc. (ICE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Intuitive Surgical, Inc. (ISRG) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ JACKSON MICH LTD TAX GO CAP IMPT BDS 2018 5.000% 06/01/31 B/E DTD [CS] DESCRIPTION: Jackson, MI	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ KLA Corporation (KLAC) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ LAKE HALLIE WIS GO CORP PURP BDS 2021 A 2.000% 10/01/23 [CS] DESCRIPTION: Lake Hallie, WI	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ LAKEVILLE MINN INDPT SCH DIST NO 194 GO SCH BLDG REF BDS 2016 A 5.000% 02/01/23 B/E DTD [CS] DESCRIPTION: Lakeville, MN	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Lam Research Corporation (LRCX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Mastercard Incorporated (MA) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ MILLERSBURG PA AREA SCH DIST GO BDS 2020 5.000% 10/01/23 B/E DTD [CS] DESCRIPTION: Millersburg, PA	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ MIPTX - Matthews Pacific Tiger Fund Investor Class [MF]	JT	\$50,001 - \$100,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ MISSISSIPPI ST GO BDS 2019 B 4.000% 10/01/36 [CS] DESCRIPTION: Mississippi	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Monster Beverage Corporation (MNST) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Nike, Inc. (NKE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ NVIDIA Corporation (NVDA) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ OLATHE KANS GO IMPT REF BDS 234 3.000% 10/01/32 [CS] DESCRIPTION: Olathe, KS	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ ONSLow CNTY N C LTD OBLIG LTD OBLIG BDS 2016 4.000% 10/01/35 [CS] DESCRIPTION: Onslow County, NC	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ OSAGE CNTY KANS GO REF AND IMPT BDS 2021 A 3.000% 09/01/30 [CS] DESCRIPTION: Osage County, KS	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PCLPX - PIMCO COMMODITIES PLUS STRATEGY FUND CLASS I-2 [MF]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PEARLAND TEX WTRWKS & SWR SYS REV REV AND REF BDS 2017 C 5.000% 09/01/23 B/E DTD 08/01/17 N/C [CS] DESCRIPTION: Pearland, TX	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PENN IND HIGH SCH BLDG CORP AD VALOREM PPTY TAX FIRST MTG BDS 2021 4.000% 07/15/34 [CS] DESCRIPTION: St. Joseph County, IN	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Pepsico, Inc. (PEP) [ST]					<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PFPMX - Parnassus Mid Cap Fund Instl Class [MF]	JT	\$50,001 - \$100,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PIFZX - PGIM Short-Term Corporate Bond Fund Class Z [MF]	JT	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PONPX - PIMCO Income Fund Class I-2 [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PRINCE GEORGES CNTY MD GO CONS PUB IMPT BDS 2014A 4.000% 09/01/32 B/E DTD 09/30/14 CLB CLB 09/01/24 [CS] DESCRIPTION: Prince George's County, MD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Procter & Gamble Company (PG) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Progressive Corporation (PGR) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Raytheon Technologies Corporation (RTX) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ ROMEOVILLE ILL GO BDS 2019 4.000% 12/30/38 [CS] DESCRIPTION: Romeoville, IL	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ S&P Global Inc. (SPGI) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Salesforce.com Inc (CRM) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SANGAMON LOGAN & MENARD CNTYS ILL CMNTY [CS] DESCRIPTION: Sangamon, Logan, & Menard County, IL	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SANTA CRUZ CNTY ARIZ UNI SCH DIST NO 35 IMPT BDS PROJ OF 2019 2020 A 5.000% 07/01/22 B/E [CS] DESCRIPTION: Santa Cruz County, Arizona	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ SARATOGA SPRINGS UTAH WTR REV REF BDS 2014 3.000% 12/01/24 B/E DTD [CS] DESCRIPTION: Saratoga Springs, UT	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Sherwin-Williams Company (SHW) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SKAGIT CNTY WASH CONS SCH DIST NO 320 [CS] DESCRIPTION: Skagit County, WA	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SOUTH CAROLINA TRANSN INFRASTRUCTURE BK REV REF BDS 2021 A 4.000% 10/01/33 [CS] DESCRIPTION: South Carolina	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Starbucks Corporation (SBUX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SULLIVAN CNTY PA SCH DIST GO NTS 2020 3.000% 04/01/28 B/E DTD 07/07/20 [CS] DESCRIPTION: Sullivan County, PA	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Sysco Corporation (SYY) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Texas Instruments Incorporated (TXN) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ TEXAS WATER DEV BRD ST REVOLVING FD REV BDS 2020 4.000% 08/01/34 [CS] DESCRIPTION: Texas	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ TIP - iShares Trust TIPS Bond [EF]	JT	\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ T-Mobile US, Inc. (TMUS) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ TOLEDO OHIO WTRWKS REV SYS BDS 2020 5.000% 11/15/33 [CS] DESCRIPTION: Toledo, OH	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Ulta Beauty, Inc. (ULTA) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Union Pacific Corporation (UNP) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ UTAH COUNTY UTAH TRANSN SALES TAX REV REF BDS 2021 4.000% 12/01/38 [CS] DESCRIPTION: Utah County, UT	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Valero Energy Corporation (VLO) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Vanguard Intl FD FTSE DEVELOPED MKTS (VEA) [EF]	JT	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VAW - Vanguard Materials Index Fund [EF]	JT	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Visa Inc. (V) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VNQ - Vanguard Real Estate Index Fund [EF]	JT	\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VO - Vanguard Mid-Cap Index Fund [EF]	JT	\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VPU - Vanguard Utilities Index Fund [EF]	JT	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ WASHINGTON ST UNIV REVS GEN REV AND REF BDS 2013 5.000% 10/01/22 B/E DTD 04/02/13 N/C [CS] DESCRIPTION: Washington State	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ Waste Management, Inc. (WM) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Zoetis Inc. Class A (ZTS) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ AGG - iShares Core US Aggregate Bond [HE]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ Cohen & Steers Real Estate Securities Fund Class I [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ DODIX - DODGE & COX INCOME FUND [HE]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IAU - iShares Gold Trust [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IEFA - iShares Core MSCI EAFE [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IEMG - iShares Core MSCI Emerging Markets [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IJR - iShares Core S&P Small-Cap [HE]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ iShares Inc. MSCI Eurozone ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IVV - iShares Core S&P 500 [HE]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ PCLPX - PIMCO COMMODITIES PLUS STRATEGY FUND CLASS I-2 [HE]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ PPFMX - Parnassus Mid Cap Fund Instl Class [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ PIFZX - PGIM Short-Term Corporate Bond Fund Class Z [HE]	SP	\$1 - \$1,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual - SC ⇒ TIP - iShares Trust TIPS Bond [EF]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VBTLX - VANGUARD TOTAL BD MKT IDX FUND [HE]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VNQ - Vanguard Real Estate Index Fund [HE]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VO - Vanguard Mid-Cap Index Fund [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Peak Ventures Fund II, L.P. [HE]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Peg Opportunity Zone [OL] LOCATION: Provo, UT, US DESCRIPTION: Real Estate Investment Firm		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
QQ Corpus Christi [OL] LOCATION: Corpus Christi, TX, US DESCRIPTION: Car wash		\$100,001 - \$250,000	Distributions	\$15,001 - \$50,000	<input type="checkbox"/>
QQRGV [OL] LOCATION: Rio Grande Valley, TX, US DESCRIPTION: Car wash		\$100,001 - \$250,000	None		<input type="checkbox"/>
QQUV Investments 2, LLC (Quick Quack Car Wash) [OL] LOCATION: Pleasant Grove & Orem, UT, US DESCRIPTION: Car wash		\$15,001 - \$50,000	Distributions	\$15,001 - \$50,000	<input type="checkbox"/>
QQUV Investments 3, LLC (Quick Quack Car Wash) [OL] LOCATION: Springville & Spanish Fork, UT, US DESCRIPTION: Car wash		\$50,001 - \$100,000	Distributions	\$15,001 - \$50,000	<input type="checkbox"/>
QQUV Investments 4, LLC (Quick Quack Car Wash) [OL] LOCATION: Utah County, UT, US DESCRIPTION: Car wash		\$50,001 - \$100,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
QQUV Investments, LLC (Quick Quack Car Wash) [OL] LOCATION: Highland & American Fork, UT, US DESCRIPTION: Car wash		\$50,001 - \$100,000	Distributions	\$15,001 - \$50,000	<input type="checkbox"/>
Residential Property in Washington, DC [RP] LOCATION: Washington, DC, US		None	Capital Gains	\$100,001 - \$1,000,000	<input type="checkbox"/>
Rise Broadband stock - fixed wireless Internet service provider - Denver, CO [PS] DESCRIPTION: Internet service provider		\$15,001 - \$50,000	None		<input type="checkbox"/>
Sundance Debt Partners, LLC [OL] LOCATION: Salt Lake City, UT, US DESCRIPTION: Real estate firm		\$250,001 - \$500,000	None		<input type="checkbox"/>
TriState Capital Holdings, Inc. (TSC) [OT] DESCRIPTION: Stock Account Collateral		None	None		<input type="checkbox"/>
Wells Fargo Interest Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Money Market Savings Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Zions Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Zions Bank Checking Account [BA]		\$500,001 - \$1,000,000	Interest	\$1 - \$200	<input type="checkbox"/>
Zions Bank Checking Plus Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<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?
Adobe Inc. (ADBE) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Advanced Micro Devices, Inc. (AMD) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Alphabet Inc. - Class A (GOOGL) [ST]		06/22/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Amazon.com, Inc. (AMZN) [ST]		02/2/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Amazon.com, Inc. (AMZN) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Anthem, Inc. (ANTM) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Apple Inc. (AAPL) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Applied Materials, Inc. (AMAT) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bank of America Corporation (BAC) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Becton, Dickinson and Company (BDX) [ST]		06/22/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
BlackRock, Inc. (BLK) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Boston Scientific Corporation (BSX) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Citigroup, Inc. (C) [ST]		06/22/2021	P	\$1,001 - \$15,000	
CME Group Inc. - Class A (CME) [ST]		06/22/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Comcast Corporation - Class A (CMCSA) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Constellation Brands, Inc. (STZ) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Danaher Corporation (DHR) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Deere & Company (DE) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dollar Tree, Inc. (DLTR) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Domo, Inc. - Class B (DOMO) [ST]		02/2/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Facebook, Inc. - Class A (FB) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fiserv, Inc. (FISV) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Global Payments Inc. (GPN) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Hilton Worldwide Holdings Inc. (HLT) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Home Depot, Inc. (HD) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Intel Corporation (INTC) [ST]		06/22/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Intercontinental Exchange Inc. (ICE) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Intuitive Surgical, Inc. (ISRG) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Lam Research Corporation (LRCX) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Microsoft Corporation (MSFT) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ Cohen & Steers Real Estate Securities Fund Class I (CSDIX) [MF]		01/19/2021	P	\$15,001 - \$50,000	
Northwestern Mutual ⇒ iShares Inc. MSCI Eurozone ETF (EZU) [MF]		06/7/2021	P	\$15,001 - \$50,000	
Northwestern Mutual - Joint ⇒ Activision Blizzard, Inc (ATVI) [ST]	JT	11/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	JT	07/19/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ Apple Inc. (AAPL) [ST]	JT	07/19/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Caterpillar, Inc. (CAT) [ST]	JT	11/8/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ EASTERN HOWARD IND THIRD MILLENNIUM SCH BLDG CORP AD VALOREM PPTY TAX FIRSTMTG 4.000% 07/15/33 [CS] DESCRIPTION: Eastern Howard, Indiana	JT	09/9/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ EASTERN HOWARD IND THIRD MILLENNIUM SCH BLDG CORP AD VALOREM PPTY TAX FIRSTMTG 4.000% 07/15/33 B/E DTD 09/09/21 [CS] DESCRIPTION: Greentown, IN	JT	08/20/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Fiserv, Inc. (FISV) [ST]	JT	07/19/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ GEORGIA ST GO BDS 2021 A 4.000% 07/01/34 B/E DTD 07/01/21 [CS] DESCRIPTION: Georgia	JT	07/16/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Global Payments Inc. (GPN) [ST]	JT	11/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Goldman Sachs International Small Cap Insights Fund (GICIX) [MF]	JT	06/22/2021	P	\$50,001 - \$100,000	
Northwestern Mutual - Joint ⇒ Hilton Worldwide Holdings Inc. (HLT) [ST]	JT	07/19/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Hilton Worldwide Holdings Inc. (HLT) [ST]	JT	08/12/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Honeywell International Inc. (HON) [ST]	JT	11/8/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ INDIANA ST FIN AUTH WASTEWATER UTIL REV FIRST LIEN REF BDS CWA AUTHORITY INC4.000% 10/01/36 B/E	JT	07/16/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DTD 07/06/21 [CS] DESCRIPTION: Indiana					
Northwestern Mutual - Joint ⇒ KLA Corporation (KLAC) [ST]	JT	11/8/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ LAKE HALLIE WIS GO CORP PURP BDS 2021 A 2.000% 10/01/23 [CS] DESCRIPTION: Lake Hallie, Wisconsin	JT	09/7/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ LAKE HALLIE WIS GO CORP PURP BDS 2021 A 2.000% 10/01/23 B/E DTD 09/07/21 [CS] DESCRIPTION: Lake Hallie, WI	JT	08/17/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Las Vegas Sands Corp. (LVS) [ST]	JT	08/12/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Lockheed Martin Corporation (LMT) [ST]	JT	11/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	07/19/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ ROMEOVILLE ILL GO BDS 2019 4.000% 12/30/38 B/E DTD 04/25/19 CLB [CS] DESCRIPTION: Romeoville, IL	JT	07/7/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Sherwin-Williams Company (SHW) [ST]	JT	08/12/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ SOUTH CAROLINA TRANSN INFRASTRUCTURE BK REV REF BDS 2021 A 4.000% 10/01/33 B/E DTD 07/07/21 CLB CLB 10/01/31 @100.000 [CS] DESCRIPTION: South Carolina	JT	11/19/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Starbucks Corporation (SBUX) [ST]	JT	07/19/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Ulta Beauty, Inc. (ULTA) [ST]	JT	11/8/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	07/19/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ UTAH COUNTY UTAH TRANSN SALES TAX REV REF BDS 2021 4.000% 12/01/38 [CS] DESCRIPTION: Utah County, Utah	JT	09/14/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ Vanguard Intl FD FTSE DEVELOPED MKTS (VEA) [EF]	JT	12/21/2021	P	\$50,001 - \$100,000	
Northwestern Mutual - Joint ⇒ Visa Inc. (V) [ST]	JT	11/8/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - SC ⇒ Cohen & Steers Real Estate Securities Fund Class I [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Northwestern Mutual - SC ⇒ iShares Inc. MSCI Eurozone ETF [MF]	SP	06/7/2021	P	\$1,001 - \$15,000	
OLATHE KANS GO IMPT REF BDS 234 3.000% 10/01/32 [CS] DESCRIPTION: Olathe, KS		06/30/2021	P	\$1,001 - \$15,000	
Peg Opportunity Zone [OL] LOCATION: Provo, UT, US DESCRIPTION: Real Estate Investment Firm		12/1/2021	P	\$1,000,001 - \$5,000,000	
PENN IND HIGH SCH BLDG CORP AD VALOREM PPTY TAX FIRST MTG BDS 2021 4.000% 07/15/34 [CS] DESCRIPTION: Mishawaka, IN		06/23/2021	P	\$1,001 - \$15,000	
Pepsico, Inc. (PEP) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Progressive Corporation (PGR) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
QQ Corpus Christi [OL] LOCATION: Corpus Christi, TX, US DESCRIPTION: Car wash		07/2/2021	P	\$100,001 - \$250,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
QQRGV [OL] LOCATION: Rio Grande Valley, TX, US DESCRIPTION: Car wash		06/21/2021	P	\$50,001 - \$100,000	
QQUV Investments 4, LLC (Quick Quack Car Wash) [OL] LOCATION: Utah County, UT, US DESCRIPTION: Car wash		06/21/2021	P	\$50,001 - \$100,000	
Raytheon Technologies Corporation (RTX) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Salesforce.com Inc (CRM) [ST]		06/22/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Texas Instruments Incorporated (TXN) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Thermo Fisher Scientific Inc (TMO) [ST]		06/22/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
T-Mobile US, Inc. (TMUS) [ST]		06/22/2021	P	\$1,001 - \$15,000	
TOLEDO OHIO WTRWKS REV SYS BDS 2020 5.000% 11/15/33 [CS] DESCRIPTION: Toledo, OH		06/2/2021	P	\$1,001 - \$15,000	
Valero Energy Corporation (VLO) [ST]		06/22/2021	P	\$1,001 - \$15,000	
Walt Disney Company (DIS) [ST]		02/2/2021	S	\$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

Source	Type	Amount
Glad Tidings, LLC	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	United Wholesale Mortgage	November 2017	Mortgage	\$250,001 - \$500,000
	Bank of Utah	June 2018	Mortgage	\$1,000,001 - \$5,000,000
	Zions First National Bank	June 2018	Home Equity Loan	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Manager	Curtis Family Georgetown Condo, LLC
Manager	Curtis Family Brighton, LLC
Manager	John Ream Curtis 800 S. Center SPE, LLC
Manager	Action Commercial Park, LLC
Member	Monticello Development Company, Inc
Limited partner	Peak Ventures Fund II, L.P.
Limited partner	Monticello Development Company, LLC
Limited partner	QQUV Investments
Trustee	Curtis Family Trust
Board of Advisors	America's Freedom Festival

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

- Ameritrade
LOCATION: US
- Curtis Family Trust
- Northwestern Mutual
- Northwestern Mutual - Joint (Owner: JT)
- Northwestern Mutual - SC (Owner: SP)

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. John Curtis , 08/13/2022