



Filing ID #10050819

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ron Kind  
**Status:** Former Member  
**State/District:** WI03

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2023  
**Filing Date:** 01/27/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
219 Pearl St., La Crosse, WI [RP]  LOCATION: La Crosse, WI, US	JT	\$50,001 - \$100,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Altra Credit Union [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Coulee State Bank Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Janus Balanced Fund - IRA ⇒ Janus Balanced Fund [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Janus Balanced Fund - Roth IRA ⇒ Janus Balanced Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Janus Balanced Fund Roth IRA SP ⇒ Janus Balanced Fund [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Janus Growth and Income Fund IRA ⇒ Janus Growth and Income Fund IRA [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Janus Growth and Income Fund Roth IRA ⇒	SP	\$1,001 - \$15,000	Dividends	\$201 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Janus Growth and Income Fund [MF]				\$1,000	<input type="checkbox"/>
N268o Buckholz Rd., Ettrick, WI [RP]	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Ettrick, WI, US					
N2711 Buckholz Rd., Ettrick, WI [RP]	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Ettrick, WI, US					
Oakmark Select Fund ⇒ Oakmark Select Fund [MF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Oakmark Select IRA ⇒ Oakmark Select Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Oakmark Select Roth IRA ⇒ Oakmark Select Fund [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Putnam International Fund - IRA ⇒ Putnam International Fund [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
WI EdVest 529 Plan ⇒ Fidelity Aggressive Portfolio [5P]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: WI					
WI EdVest 529 Plan 2 ⇒ Fidelity Aggressive Portfolio [5P]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: WI					
Wisconsin Deferred Compensation Retirement Fund - Fidelity Contra Fund [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Wisconsin Deferred Compensation Retirement Fund - Fidelity Contra Fund [MF]	SP	\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<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

None disclosed.

## SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Altra Federal Credit Union	2011	Mortgage on N2736 S. Buckholz Rd., Ettrick, WI	\$100,001 - \$250,000

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

<ul style="list-style-type: none"><li>◦ Janus Balanced Fund - IRA</li><li>◦ Janus Balanced Fund - Roth IRA</li><li>◦ Janus Balanced Fund Roth IRA SP (Owner: SP)</li><li>◦ Janus Growth and Income Fund IRA (Owner: SP)</li><li>◦ Janus Growth and Income Fund Roth IRA (Owner: SP)</li><li>◦ Oakmark Select Fund (Owner: JT)</li><li>◦ Oakmark Select IRA</li><li>◦ Oakmark Select Roth IRA</li><li>◦ Putnam International Fund - IRA (Owner: SP)</li><li>◦ WI EdVest 529 Plan (Owner: DC) LOCATION: WI</li><li>◦ WI EdVest 529 Plan 2 (Owner: DC) LOCATION: WI</li></ul>
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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. Ron Kind , 01/27/2023