



Filing ID #10061233

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Kristen McDonald Rivet  
**Status:** Congressional Candidate  
**State/District:** MIo8

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 07/5/2024  
**Period Covered:** 01/01/2023– 06/5/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Centered Strategies LLC, 100% Interest [OL] LOCATION: Bay City, MI, US DESCRIPTION: Inactive Consulting LLC		\$15,001 - \$50,000	None		
Michigan Education Savings Plan [5P] LOCATION: MI	DC	\$15,001 - \$50,000	Tax-Deferred		
Newport Vanguard Retirement ⇒ Vanguard Target Retirement 2030 Fund (VTHR) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Northwestern Mutual Annuity [FN]		\$50,001 - \$100,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ American Funds High-Income Trust A (AHITX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ American Funds Investment Co of America A (AIVSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Northwestern Mutual IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fundamental Investors, Class A Shares (ANCFX) [MF]					
Northwestern Mutual IRA ⇒ The Income Fund of America, Class A Shares (AMECX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Simple IRA ⇒ Cash [IH]		\$15,001 - \$50,000	None		
T Rowe Price Retirement Fund 2040 [IH]		\$500,001 - \$1,000,000	Tax-Deferred		
Templeton Global Bond Fund Class A (TPINX) [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
United Bay Community Credit Union Account [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Voya Retirement Fund ⇒ American Funds EuroPacific Growth A (AEPGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Voya Retirement Fund ⇒ American Funds EuroPacific Growth A (AEPGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Retirement Fund ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Retirement Fund ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Voya Retirement Fund ⇒ PGIM Jennison Growth Fund Class A (PJFAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Voya Retirement Fund ⇒ SSGA S&P 500 Index Fd (SVSPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Retirement Fund ⇒ State Street Aggregate Bond Index Fund Class K (SSFEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Retirement Fund ⇒ State Street Small/Mid Cap Equity Index Portfolio		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(SSMHX) [MF]					
Voya Retirement Fund ⇒ State Street Small/Mid Cap Equity Index Portfolio (SSMHX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Voya Retirement Fund ⇒ T. Rowe Price Mid-Cap Value Fund, Inc. (TRMCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Voya Select Advantage IRA ⇒ American Funds EuroPacific Growth Cl F-1 Shs (AEGFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select Advantage IRA ⇒ BlackRock Eq Dividend R (MRDVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select Advantage IRA ⇒ Fidelity Advisor New Insights Fund - Class M (FNITX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select Advantage IRA ⇒ Invesco Developing Markets Fund Class R (ODVNX) [MF]		\$1 - \$1,000	Tax-Deferred		
Voya Select Advantage IRA ⇒ Invesco Real Estate Fund Class R Shares (IARRX) [MF]		\$1 - \$1,000	Tax-Deferred		
Voya Select Advantage IRA ⇒ Principal Fds, Inc.MidCap Fd Cl R-1 (PMSBX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select Advantage IRA ⇒ Templeton Global Bond Fund Class A (TPINX) [MF]		\$1 - \$1,000	Tax-Deferred		
Voya Select Advantage IRA ⇒ Voya Intermediate Bond Portfolio Adviser (IIBPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select Advantage IRA ⇒ VY JPMorgan Small Cap Core Equity Portfolio Adviser (IJSAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
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\* 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
State of Michigan	salary	\$36,000.00	\$71,400.00
City of Bay City	salary	\$.00	\$445.00
Michigan Health Improvement Alliance	salary	\$.00	\$2,596.00
Centered Strategies LLC	Salary	\$.00	\$18,750.00
State of Michigan	Spouse Salary	N/A	N/A
City of Bay City	Spouse Salary	N/A	N/A
Delta College	Spouse Salary	N/A	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	United Bay Community Credit Union	November 2020	Mortgage	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors	Rivet Community Fund
Board of Directors	Michigan Center for Rural Health
Vice President	Michigan Future
COMMENTS: ceased in January 2023	

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Newport Vanguard Retirement
- Northwestern Mutual IRA (Owner: SP)
- Schwab Simple IRA
- Voya Retirement Fund (Owner: SP)
- Voya Retirement Fund
- Voya Select Advantage IRA

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

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:** Kristen McDonald Rivet , 07/5/2024