



Filing ID #10062386

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Dr. Bob Lorinser Jr.
Status: Congressional Candidate
State/District: MI01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 07/1/2024
Period Covered: 01/01/2023– 04/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Aho Financial ⇒ AB Large Cap Growth Fund, Inc. - Advisor Class (APGYX) [MF]		\$100,001 - \$250,000		None	
Aho Financial ⇒ American Funds International Vantage Fund Class F- 2 (AIVFX) [MF]		\$50,001 - \$100,000		None	
Aho Financial ⇒ Cohen & Steers Realty Shares, Inc. Class I (CSJIX) [MF]		\$15,001 - \$50,000		None	
Aho Financial ⇒ Federated Hermes Kaufmann Small Cap Fund IS Shares (FKAIX) [MF]		\$50,001 - \$100,000		None	
Aho Financial ⇒ First Trust VL Dividend (FVD) [EF]		\$15,001 - \$50,000		None	
Aho Financial ⇒ Freedom 100 Emerging Markets ETF (FRDM) [EF]		\$15,001 - \$50,000		None	

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Aho Financial ⇒ Neuberger Berman Large Cap Value Fd Inst Cl (NBPIX) [MF]		\$15,001 - \$50,000	None		
Aho Financial ⇒ Undiscovered Managers Behavioral Value Fund Class L (UBVLX) [MF]		\$50,001 - \$100,000	None		
Bell Financial ⇒ American Beacon Small Cap Value Fd Inst Cl (AVFIX) [MF]		\$15,001 - \$50,000	None		
Bell Financial ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		\$50,001 - \$100,000	None		
Bell Financial ⇒ Eaton Vance Income Fd of Boston Insti Shs (EIBIX) [MF]		\$15,001 - \$50,000	None		
Bell Financial ⇒ Fidelity Advisor Short-Term Bond Fund: Class I (FBNIX) [MF]		\$15,001 - \$50,000	None		
Bell Financial ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]		\$50,001 - \$100,000	None		
Bell Financial ⇒ John Hancock Fds III Disciplined Value Fund Class I (JVLIX) [MF]		\$250,001 - \$500,000	None		
Bell Financial ⇒ JPMorgan Core Bond Fund I Class (WOBDX) [MF]		\$50,001 - \$100,000	None		
Bell Financial ⇒ MFS Growth Fund Class I (MFEIX) [MF]		\$250,001 - \$500,000	None		
Bell Financial ⇒ MFS Mid Cap Value Fund - Class I (MCVIX) [MF]		\$15,001 - \$50,000	None		
Bell Financial ⇒ PGIM Short-Term Corporate Bond Fund Class Z (PIFZX) [MF]		\$15,001 - \$50,000	None		
Bell Financial ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
T. Rowe Price International Bond Fund (TNBMX) [MF]					
Bell Financial ⇒ T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF]		\$100,001 - \$250,000		None	
Bell Financial ⇒ Touchstone Mid Cap Growth Class Y (TEGYX) [MF]			\$15,001 - \$50,000	None	
Bell Financial ⇒ Victory Trivalent International Small-Cap CL I (MISIX) [MF]			\$15,001 - \$50,000	None	
Bell Financial ⇒ Wasatch Small Cap Growth Fund Instl Cl (WIAEX) [MF]			\$15,001 - \$50,000	None	

* 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
Marquette County Health Department	salary	\$20,000.00	\$97,575.00
MGH pension	pension	\$20,000.00	\$65,454.00
WebMD Health Corp	speaker fee	\$1,500.00	\$1,500.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Medical Director	Marquette County Health Department
COMMENTS: Retired Feb 2024	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
2024	Marquette General Hospital Group Annuity Agreement	pension from previous employment

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Aho Financial
- Bell Financial

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: Dr. Bob Lorinser Jr., 07/1/2024