



Filing ID #10039488

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ben McAdams  
**Status:** Former Member  
**State/District:** UTo4

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2021  
**Filing Date:** 01/30/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
America First Credit Union [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Citibank Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ American Funds EuroPacific Growth Fund Class R-6 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Apple Inc. (AAPL) [ST]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒		\$100,001 -	Tax-Deferred		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Tx. &gt; \$1,000?</b>
DPW FID 500 INDEX INST [MF]		\$250,000		
Retirement ⇒ DPW FID DIVERSIFD INTL K [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ DPW VANG SM GR IDX INST [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID 500 INDEX INST [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID FREEDOM 2040 K [MF]		\$100,001 - \$250,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID FREEDOM 2040 K [MF]		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID FREEDOM 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID FREEDOM 2045 K [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID INFLAT PROT BOND [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID INFLAT PROT BOND [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID INTL INDEX PR [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID INTL INDEX PR [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID SMALL CAP GROWTH [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Tx. &gt; \$1,000?</b>
Retirement ⇒ FID SMALL CAP GROWTH [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID US BOND IDX PR [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ FID US BOND IDX PR [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Cash Reserves IRA [IH]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Commodity Strategies Fund CL S [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Emerging Markets Fund [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Freedom 2040 K [MF]		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Freedom 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Global Equity Class S [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Global Infrastructure CL S [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Global Opportunities Credit Fund [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Global Real Estate Securities S [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Inflat Prot Bond [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity International Developed Market Fund [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Intl Index Pr [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Tx. &gt; \$1,000?</b>
Retirement ⇒ Fidelity iShares Core S&P 500 [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Russell Inv Multi Asset Grow Strat S [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Small Cap Growth [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity Strategic Bond Fund [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity US Small Cap Equity Class S [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Fidelity US Strategic Equity [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Main Street All Cap Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Oppenheimer Funds Capital Appreciation [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Russell Inv Unconstr Total Return Class S [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ SS US BOND INDEX II [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ State of Utah Pension [PE]		\$15,001 - \$50,000	None	<input type="checkbox"/>
Retirement ⇒ URS BOND FUND [MF]		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Tx. &gt; \$1,000?</b>
Retirement ⇒ URS INTERNATIONAL FUND [MF]		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ URS LARGE CAP GROWTH FUND [MF]		\$100,001 - \$250,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ URS LARGE CAP VALUE FUND [MF]		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ URS SMALL CAP FUND [MF]		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Vanguard Institutional Index Fund Institutional Shares [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Retirement ⇒ Vanguard Total Bond Market Index Fund Institutional Shares [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Salt Lake City Rental [RP]	JT	\$250,001 - \$500,000	None	<input type="checkbox"/>
LOCATION: UT, UT, US				
Salt Lake rental [RP]	SP	\$100,001 - \$250,000	Rent	None
LOCATION: Salt Lake City, UT, US				
USAA Checking/Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200
Zions bank accounts [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200

\* 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**

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
	Utah Higher Education Assistance	May 2003	Student loan	\$15,001 - \$50,000
SP	Conduent/ACS Educational Services	May 2002	Student loan for spouse	\$15,001 - \$50,000
JT	Penny Mac	2016	Rental property	\$100,001 - \$250,000
JT	Salal Credit Union	December 2018	Loan for the cost to install solar panels on personal residence	\$15,001 - \$50,000
JT	Cenlar Bank	March 2019	DC studio apartment personal residence	\$100,001 - \$250,000
JT	Specialized Loan Servicing	June 2020	Mortgage on primary residence	\$500,001 - \$1,000,000

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

<b>Date</b>	<b>Parties To</b>	<b>Terms of Agreement</b>
January 2010	Myself and the State of Utah	Pension

**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**

- Retirement

### **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. Ben McAdams , 01/30/2021