



Filing ID #10059185

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Kirsten Engel
Status: Congressional Candidate
State/District: AZ06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 08/9/2024
Period Covered: 01/01/2023– 07/14/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Arizona Optional Retirement Plan (ORP) ⇒ Fidelity Capital and Income Fund (FAGIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Arizona Optional Retirement Plan (ORP) ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Arizona Optional Retirement Plan (ORP) ⇒ Fidelity Select Consumer Staples (FDFAZ) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Arizona Optional Retirement Plan (ORP) ⇒ First Trust NASDAQ Clean Edge Green Energy Index Fund (QCLN) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Arizona Optional Retirement Plan (ORP) ⇒ iShares MSCI Global Min Vol Factor ETF (ACWV) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Arizona Optional Retirement Plan (ORP) ⇒ MassMutual Select Mid Cap Growth Equity II Fund Class I (MEFZX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
Arizona Optional Retirement Plan (ORP) ⇒ Pacer Trendpilot 100 ETF (PTNQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Arizona Optional Retirement Plan (ORP) ⇒ Permanent Portfolio Class I (PRPFX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Arizona Optional Retirement Plan (ORP) ⇒ Vanguard Bond Index Fund Total Bond Mkt Index Fund Institutional Share (VBTIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Arizona Universities 403(b) Retirement Plan ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Arizona Universities 403(b) Retirement Plan ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Arizona Universities 403(b) Retirement Plan ⇒ Fidelity Contrafund K6 (FLCNX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
Arizona Universities 403(b) Retirement Plan ⇒ Fidelity Select Utilities Growth Portfolio (FSUTX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Arizona Universities 403(b) Retirement Plan ⇒ Kopernik Global All-Cap Fund- Institutional Class (KGGIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Arizona Universities 403(b) Retirement Plan ⇒ Lord Abbett Inv Tr. Short Duration Income Fd Cl I (LLDYX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Arizona Universities 403(b) Retirement Plan ⇒ New Perspective Fund, Class F-2 Shares (ANWFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Arizona Universities 403(b) Retirement Plan ⇒ Vanguard Bond Index Fund Total Bond Mkt Index Fund Institutional Share (VBTIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Bank Account ⇒ Wells Fargo Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Bank Account ⇒ Wells Fargo Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Berkshire Hathaway Inc. New (BRK.B) [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Brokerage Account ⇒	JT	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Cash Reserves (FDRXX) [MF]					
Saleska-Engel Family Revocable Trust ⇒ Personal residence [RP]	JT	\$500,001 - \$1,000,000	Rent	\$1,001 - \$2,500	\$5,001 - \$15,000
LOCATION: Tucson / Pima, AZ, US DESCRIPTION: During a portion of the reporting period, the filer and her spouse occasionally rented out the guesthouse attached to their personal residence.					
Scott R. Saleska IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]					
Scott R. Saleska IRA ⇒ Insured Deposit Account [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
SEP-IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
SEP-IRA ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Spouse's Arizona Optional Retirement Plan (ORP) ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse's Arizona Optional Retirement Plan (ORP) ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Spouse's Arizona Optional Retirement Plan (ORP) ⇒ Fidelity Select Portfolio Medical Technology and Devices Portfolio (FSMEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse's Arizona Optional Retirement Plan (ORP) ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse's Arizona Optional Retirement Plan (ORP) ⇒ MassMutual Select Mid Cap Growth Equity II Fund Class I (MEFZX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Spouse's Arizona Optional Retirement Plan (ORP) ⇒ The Private Shares Fund Class I (PIIVX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse's Arizona Optional Retirement Plan (ORP) ⇒ Vanguard Bond Index Fund Total Bond Mkt Index Fund Institutional Share (VBTIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Spouse's Arizona Universities 403(b) ⇒ Fidelity Contrafund K6 (FLCNX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse's Arizona Universities 403(b) ⇒ JPMorgan Mid Cap Value Fund-R6 (JMVYX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse's Arizona Universities 403(b) ⇒ T. Rowe Price Retirement 2010 Fund - I Class (TRPUX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse's Arizona Universities 403(b) ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse's Arizona Universities 403(b) ⇒ Vanguard Small-Cap Value Index Fd Admiral (VSIAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Tulane University Faculty and Administrative Retirement Plan ⇒ CREF Core Bond Account - Class R2 (QCBMPX) [MF]		\$1 - \$1,000	Tax-Deferred		
Tulane University Faculty and Administrative Retirement Plan ⇒ CREF Global Equities Account - R2 (QCGLPX) [MF]		\$1 - \$1,000	Tax-Deferred		
Tulane University Faculty and Administrative Retirement Plan ⇒ CREF Social Choice Account - R2 (QCSCPX) [MF]		\$1 - \$1,000	Tax-Deferred		
Tulane University Faculty and Administrative Retirement Plan ⇒ TIAA Traditional [FN]		\$100,001 - \$250,000	Tax-Deferred		

* 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
University of Arizona	Salary	\$78,458.00	\$154,841.00
University of Arizona	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	M&T Bank (holder of mortgage on Filer's personal residence)	November 2021	Mortgage on personal residence with attached guesthouse	\$250,001 - \$500,000
COMMENTS: Filer is reporting this mortgage liability on her personal residence because filer and her husband occasionally rent out the residence's attached guesthouse. The mortgages on this same residence reported in Filer's 2022 Financial Disclosures (previously held by Wells Fargo, Fairway Independent Mortgage and Flagstar) were each paid off before being purchased by M&T Bank.				

SCHEDULE E: POSITIONS

Position	Name of Organization
Faculty member	University of Arizona College of Law
Member, Legal Advisory Board	Tulane Environmental Law Clinic

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 1992	Filer and Tulane University	As a result of the filer's continued participation in the Tulane University Faculty and Administrative Retirement Plan, the filer is benefited by this continued agreement with a former employer.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Arizona Optional Retirement Plan (ORP)
DESCRIPTION: This is a 401(a) Defined Contribution Plan for employees of the University of Arizona, the filer's employer.
- Arizona Universities 403(b) Retirement Plan
DESCRIPTION: Supplemental Retirement Plan for employees of the University of Arizona, the filer's employer.
- Bank Account (Owner: JT)
LOCATION: US
- Brokerage Account (Owner: JT)
- Saleska-Engel Family Revocable Trust (Owner: JT)
DESCRIPTION: Revocable trust that holds the personal residence of the filer and her spouse.
- Scott R. Saleska IRA (Owner: SP)
- SEP-IRA
- Spouse's Arizona Optional Retirement Plan (ORP) (Owner: SP)

- Spouse's Arizona Universities 403(b) (Owner: SP)
- Tulane University Faculty and Administrative Retirement Plan
DESCRIPTION: This is a 403(b) retirement plan for employees of Tulane University, the filer's former employer.

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: Kirsten Engel , 08/9/2024