



Filing ID #10062872

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Jennifer Schultz  
**Status:** Congressional Candidate  
**State/District:** MN08

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 09/2/2024  
**Period Covered:** 01/01/2023– 08/21/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DC1 529 MN College Savings Plans [5P]  LOCATION: MN	JT	\$50,001 - \$100,000	None		
DC2 529 MN College Savings Plans [5P]  LOCATION: MN	JT	\$50,001 - \$100,000	None		
Minnesota State Retirement System [MF]		\$50,001 - \$100,000	Tax-Deferred		
Securian Retirement UMN [MF]  DESCRIPTION: Securian Diversified Portfolio Index		\$50,001 - \$100,000	Tax-Deferred		
TIAA City of New York 401K [MF]  DESCRIPTION: TIAA Traditional CREF Stock R2 TIAA Acc Social Ch Eq T3 TIAA Real Est CREF Core Bond CREF Inf-Linked Bond CREF Social Choice R2	SP	\$50,001 - \$100,000	Tax-Deferred		
TIAA Traditional IRA [MF]  DESCRIPTION: CREF Inf-Linked Bond R1	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TIAA UMN Faculty Retirement Plan [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: TIAA Traditional CREF Stock R2 CREF Equity Index CREF Global Equities T-C Real Est CREF Core Bond CREF Inf-Linked Bond					
UHG 401(K) Plan [MF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: VANG INST 500 IDX US SMID AF EuroPAC Growth VANG IS EXT MKT IDX DIV ACTIVE BOND FUND VANGUARD TARGET STABLE VALUE FUND					
UMN 457 Def Comp [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
DESCRIPTION: Vanguard Inst Index Vanguard Ext Mkt Vang Dev Mkt Vang VMMR ML Gen Acct Bonds					
UMN 457 Def Comp Retirement Plan [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Fidelity Calv US Lg Cp Vang Tot Bd Mk Bond					
UMN Faculty Retirement Plan [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
DESCRIPTION: Fidelity Vanguard Inst Index Vanguard Dev Mkt Vangaurd VMMR-Fed MMkt JPMCB Calv US Retirement account--diversified portfolio; EIF					
UMN Faculty Retirement Plan [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Fidelity Investments Vanguard Inst Index Vanguard Bond Inv Vanguard VMMR-Fed MMkt					
UMN Optional Retirement Plan [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Vanguard Vang Target Vang Selected Value Fund Vang Dividend Growth Fund Vang FTSE Social Index Adm					
UMN Optional Retirement Plan [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Fidelity Calv US Lg Cp Vang Ext Mkt Idx Vang Inst Index Plus ML Gen Bond JPMCB SR PB					
UMN Optional Retirement Plan [MF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: ML Gen Acct Bonds VANG Inst Index JPM SR Blend VANG VMMR-Fed MMKT					
UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000

\* 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
Waxman Strategies	Consulting	\$50,000.00	\$60,000.00
University of Minnesota	Spouse Salary	\$85,000.00	\$120,000.00
University of Minnesota	Salary	\$80,000.00	\$130,000.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Minnesota State Legislator COMMENTS: from 2015-2022	MN House of Representatives
Great Lakes Commissioner COMMENTS: Appointed by Governor 2015-2022	Great Lakes Commission

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 2023	Waxman Strategies	Health economics and policy consulting contract.

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

Source (Name and Address)	Brief Description of Duties
Waxman Strategies (Washington DC, DC, US)	Consulting services for health economics & policy.

## 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

**COMMENTS**

**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:** Jennifer Schultz , 09/2/2024