



Filing ID #10062882

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2024  
**Filing Date:** 09/4/2024  
**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]	JT	\$50,001 - \$100,000	None		
LOCATION: MN					
DC2 529 MN College Savings Plans [5P]	JT	\$50,001 - \$100,000	None		
LOCATION: MN					
Minnesota State Retirement System [MF]		\$50,001 - \$100,000	Tax-Deferred		
Securian Retirement UMN [MF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Securian Diversified Portfolio Index					
TIAA City of New York 401K [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
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					
TIAA Traditional IRA [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: CREF Inf-Linked Bond R1					

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
US of Care	Consulting	\$0.00	\$30,000.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

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

## 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

### **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 , 09/4/2024