



Filing ID #10050928

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Mariannette Jane Miller-Meeks
Status: Member
State/District: IA01

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2021
Filing Date: 02/17/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|---------------------|----------------|--------|--------------------------|
| Baird Core Plus Bond Inst [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA Emerging Markets Core Equity Portfolio Inst Class [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA Five Year Global Fixed Income [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA Global Real Estate Secs [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA International Small Cap Value Portfolio Inst Class [MF] | JT | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA Intl High Relative Profitability Port Inst Class [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA Intl Small Company Port Inst Class [MF] | JT | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA Intl Value III [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA Two Year Global Fixed Income [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA US High Relative Profitability Insti [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|----------------|--------|--------------------------|
| DFA US Large Cap Value III [MF] | JT | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA US Micro Cap [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DFA US Small Cap Value [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| SPDR Barclays Short Term Treasury ETF [MF] | JT | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stone Ridge Reinsurance risk Premium [MF] | JT | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| TD Ameritrade Money Market Fund [MF] | JT | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA-CREF => CREF Bond Market R3 [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA-CREF => CREF Equity Index R3 [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA-CREF => CREF Global Equities R3 [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA-CREF => CREF Growth R3 [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA-CREF => CREF Money Market [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA-CREF => CREF Stock R3 [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA-CREF => TIAA Traditional [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA-CREF => TIAA-CREF Money Market Fund [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard FTSE Developed Markets [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|---------------------|----------------|--------|--------------------------|
| Vanguard Health Care Fund IRA [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard Inter-Term Invt Grade Admiral [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard Roth IRA [IH] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard Roth IRA [IH] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard Short-Term Treasury Admiral [MF] | JT | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard Small Cap Value Index Admiral [MF] | JT | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard Total Bond Market Index Admiral [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard Total Stock Market [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard Value Index Admiral [MF] | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Vanguard Equity Income Fund I [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Non deductible Traditional IRA | | | | | |
| Voya Financial ⇒ Dodge & Cox International Stock Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: 401K through GRHS | | | | | |
| Voya Financial ⇒ Vanguard Dividend Growth Fund Inv [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: 401K through GRHS | | | | | |
| Voya Financial ⇒ Vanguard Mid-Cap Index Fund Inst [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: 401K through GRHS | | | | | |
| Voya Financial ⇒ Vanguard Small-Cap Index Fund Inst [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: 401K through GRHS | | | | | |
| Voya Financial ⇒ Vanguard Total Bond Market Ind F Adm [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: 401K through GRHS | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------|----------------|--------|--------------------------|
| Voya Financial ⇒ Voya Fixed Account [MF] DESCRIPTION: 401K through GRHS | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Voya Financial ⇒ Voya Fixed Plus Account III [MF] DESCRIPTION: 401K through GRHS | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Voya Financial ⇒ Voya Fixed Plus Account III A [MF] DESCRIPTION: Deferred Salary from GRHS | | \$100,001 - \$250,000 | Tax-Deferred | | <input type="checkbox"/> |
| Voya Financial ⇒ Voya Fixed Plus Account III A [MF] DESCRIPTION: 401K through GRHS | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Voya Financial ⇒ Voya Global Bond Port [MF] DESCRIPTION: 401K through GRHS | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Voya Financial ⇒ Voya Large Cap Growth Port [MF] DESCRIPTION: 401K through GRHS | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Voya Financial ⇒ VY Baron Growth Portofolio [MF] DESCRIPTION: 401K through GRHS | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Voya Financial ⇒ VY Inv OppGlobal Port [MF] DESCRIPTION: 401K through GRHS | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Voya Financial ⇒ VY T Rowe Price Growth Equity [MF] DESCRIPTION: Deferred salary through GRHS | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |

* 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

| Source | Type | Amount |
|---|---|--------------|
| Voya Retirement Insurance & Annuity | deferred salary from Great River Health Systems 2015-2019 | \$172,734.00 |
| River Hills Community Health Center | spouse salary | \$3,658.00 |
| Iowa Public Employees Retirement System | state pension | \$4,972.00 |
| Social Security Administration | Spouse Social Security | \$24,528.00 |
| US House of Representatives (Congress) | salary | \$150,607.00 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-----------------|---------------|--|-----------------------|
| JT | Iowa State Bank | Sept 2010 | mortgage on personal residence in Ottumwa, IA (not rented) | \$250,001 - \$500,000 |

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

| Source | Trip Details | | | | Inclusions | | |
|--|--------------|-----------|---|------------------|-------------------------------------|-------------------------------------|--------------------------|
| | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| Conservative Climate Foundation (COP 26) | 11/5/2021 | 11/9/2021 | Washington, DC - Glasgow, Scotland - Washington, DC | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- TIAA-CREF
DESCRIPTION: Retirement Account
- Voya Financial
DESCRIPTION: Candidate 401K with employer Great River Health Systems

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. Mariannette Jane Miller-Meeks , 02/17/2023