



Filing ID #10062386

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Dr. Bob Lorinser Jr.
Status: Congressional Candidate
State/District: MI01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 07/1/2024
Period Covered: 01/01/2023– 04/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|--------------------------|----------------|-------------------------------------|-----------------------------|
| Aho Financial ⇒ AB Large Cap Growth Fund, Inc. - Advisor Class (APGYX) [MF] | | \$100,001 - \$250,000 | None | | |
| Aho Financial ⇒ American Funds International Vantage Fund Class F- 2 (AIVFX) [MF] | | \$50,001 - \$100,000 | None | | |
| Aho Financial ⇒ Cohen & Steers Realty Shares, Inc. Class I (CSJIX) [MF] | | \$15,001 - \$50,000 | None | | |
| Aho Financial ⇒ Federated Hermes Kaufmann Small Cap Fund IS Shares (FKAIX) [MF] | | \$50,001 - \$100,000 | None | | |
| Aho Financial ⇒ First Trust VL Dividend (FVD) [EF] | | \$15,001 - \$50,000 | None | | |
| Aho Financial ⇒ Freedom 100 Emerging Markets ETF (FRDM) [EF] | | \$15,001 - \$50,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|--------------|--------------------------|-----------------------|--|--------------------------------------|
| Aho Financial ⇒ Neuberger Berman Large Cap Value Fd Inst Cl (NBPIX) [MF] | | \$15,001 - \$50,000 | None | | |
| Aho Financial ⇒ Undiscovered Managers Behavioral Value Fund Class L (UBVLX) [MF] | | \$50,001 - \$100,000 | None | | |
| Bell Financial ⇒ American Beacon Small Cap Value Fd Inst Cl (AVFIX) [MF] | | \$15,001 - \$50,000 | None | | |
| Bell Financial ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF] | | \$50,001 - \$100,000 | None | | |
| Bell Financial ⇒ Eaton Vance Income Fd of Boston Insti Shs (EIBIX) [MF] | | \$15,001 - \$50,000 | None | | |
| Bell Financial ⇒ Fidelity Advisor Short-Term Bond Fund: Class I (FBNIX) [MF] | | \$15,001 - \$50,000 | None | | |
| Bell Financial ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF] | | \$50,001 - \$100,000 | None | | |
| Bell Financial ⇒ John Hancock Fds III Disciplined Value Fund Class I (JVLIX) [MF] | | \$250,001 - \$500,000 | None | | |
| Bell Financial ⇒ JPMorgan Core Bond Fund I Class (WOBDX) [MF] | | \$50,001 - \$100,000 | None | | |
| Bell Financial ⇒ MFS Growth Fund Class I (MFEIX) [MF] | | \$250,001 - \$500,000 | None | | |
| Bell Financial ⇒ MFS Mid Cap Value Fund - Class I (MCVIX) [MF] | | \$15,001 - \$50,000 | None | | |
| Bell Financial ⇒ PGIM Short-Term Corporate Bond Fund Class Z (PIFZX) [MF] | | \$15,001 - \$50,000 | None | | |
| Bell Financial ⇒ | | \$1,001 - \$15,000 | None | | |

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|--|-------|--------------------------|----------------|-------------------------------------|-----------------------------|
| T. Rowe Price International Bond Fund (TNBMX) [MF] | | | | | |
| Bell Financial ⇒ T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF] | | \$100,001 - \$250,000 | None | | |
| Bell Financial ⇒ Touchstone Mid Cap Growth Class Y (TEGYX) [MF] | | \$15,001 - \$50,000 | None | | |
| Bell Financial ⇒ Victory Trivalent International Small-Cap CL I (MISIX) [MF] | | \$15,001 - \$50,000 | None | | |
| Bell Financial ⇒ Wasatch Small Cap Growth Fund Instl Cl (WIAEX) [MF] | | \$15,001 - \$50,000 | None | | |

* 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 |
|------------------------------------|-------------|-------------------------------------|--------------------------|
| Marquette County Health Department | salary | \$20,000.00 | \$97,575.00 |
| MGH pension | pension | \$20,000.00 | \$65,454.00 |
| WebMD Health Corp | speaker fee | \$1,500.00 | \$1,500.00 |

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|----------------------------|------------------------------------|
| Medical Director | Marquette County Health Department |
| COMMENTS: Retired Feb 2024 | |

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|------|--|----------------------------------|
| 2024 | Marquette General Hospital Group Annuity Agreement | pension from previous employment |

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- o Aho Financial
- o Bell Financial

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: Dr. Bob Lorinser Jr., 07/1/2024