



Filing ID #10043160

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ashley Hinson Arenholz  
**Status:** Member  
**State/District:** IA01

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2020  
**Filing Date:** 08/13/2021  
**Period Covered:** 01/01/2019– 12/31/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alibaba Group Holding Limited American Depository Shares each representing eight Ordinary share (BABA) [ST]	SP	\$1,001 - \$15,000	None		
Amazon.com, Inc. (AMZN) [ST]	SP	\$15,001 - \$50,000	None		
ANP Properties, Inc. [RP]	SP	\$100,001 - \$250,000	Rent	Not Applicable	\$5,001 - \$15,000
LOCATION: Waterloo, IA, US					
Apple Inc. (AAPL) [ST]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Ashley E Hinson Revocable Trust ⇒ American Funds Capital World Growth & Income Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Ashley E Hinson Revocable Trust ⇒ Prudential Annuities Live Advance Series Xtra Credit [OT]		\$100,001 - \$250,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
DESCRIPTION: Variable Annuity					
Constellation Brands, Inc. (STZ) [ST]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DESCRIPTION: Constellation Brands, Inc.					
CRBT Checking Account [BA]	SP	\$1,001 - \$15,000	Interest	Not Applicable	\$201 - \$1,000
Gray Television, Inc. (GTN) [ST]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Heron Therapeutics, Inc. (HRTX) [ST]	SP	\$1,001 - \$15,000	Capital Gains	Not Applicable	\$1 - \$200
QCR Holdings, Inc. (QCRH) [ST]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Roth IRA ⇒ FPA Crescent Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Invesco Oppenheimer Developing Markets Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Matthews Asia Dividend Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ MFS Aggressive Growth Allocation fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ MFS International Intrinsic Value Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ MFS New Discovery Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA ⇒ State Street S&P 500 Index Fund SVSPX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ UBS Sweep Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Tesla, Inc. (TSLA) [ST]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA ⇒ American Funds New Perspective Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ American Funds New World Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ iShares Core Dividend ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ iShares US Healthcare ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ ProShares S&P 500 Aristocrats ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ UBS Sweep Account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Van Eck Vectors Biotech ETF (BBH) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Vanguard Dividend Growth Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Wisdomtree US Mid Cap Dividend ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Wisdomtree US Small Cap Dividend ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ American Funds - Fundamental Investors [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Delaware Emerging Markets Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Franklin Mutual Global Discovery [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Invesco Oppenheimer Gold & Special Minerals Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Transportation Insurance & Consultants Inc 401k ⇒ Invesco Oppenheimer International Bond [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Invesco Small Cap Growth Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Mass Mutual S&P 500 Index Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Pimco Total Return [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Pioneer Strategic Income Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Premier Barings High Yield Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ T Rowe Price Frontier Mid Cap Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ The Hartford Healthcare Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Victory Sycamore Established Value Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Victory Sycamore Small Company Opportunity Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transportation Insurance & Consultants Inc 401k ⇒ Virtus Ceredex Large Cap Value Equity Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Transportation Insurance & Consultants, Inc. [OL]	SP	\$250,001 - \$500,000	Dividends	Not Applicable	\$100,001 - \$1,000,000
LOCATION: Waterloo, IA, US					
DESCRIPTION: Insurance agency					
Uniform Transfer to Minors - Jax ⇒ Columbia Dividend Income Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Uniform Transfer to Minors - Jax ⇒ DWS RREEF Global Infrastructure Fund [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Uniform Transfer to Minors - Jax ⇒ First Eagle Overseas Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Uniform Transfer to Minors - Jax ⇒ FPA Crescent Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000
Uniform Transfer to Minors - Jax ⇒ Ishares Core Dividend Growth ETF [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Uniform Transfer to Minors - Jax ⇒ Matthews Asia Dividend Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Uniform Transfer to Minors - Jax ⇒ MFS New Discovery Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000
Uniform Transfer to Minors - Jax ⇒ State Street S&P 500 Index Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000
Uniform Transfer to Minors - Max ⇒ Columbia Dividend Income Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Uniform Transfer to Minors - Max ⇒ DWS RREEF Global Infrastructure Fund [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Uniform Transfer to Minors - Max ⇒ First Eagle Overseas Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Uniform Transfer to Minors - Max ⇒ FPA Crescent Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000
Uniform Transfer to Minors - Max ⇒ Ishares Core Dividend Growth ETF [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Uniform Transfer to Minors - Max ⇒ Matthews Asia Dividend Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Uniform Transfer to Minors - Max ⇒ MFS New Discovery Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000
Uniform Transfer to Minors - Max ⇒ State Street S&P 500 Index Fund [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000

\* 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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Transportation Insurance & Consultants Inc. - Elliott-Hartman Agency	Spouse salary	N/A	N/A
State of Iowa	Salary	N/A	\$32,801.73

#### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Iowa Bankers Mortgage Corp.	November 2017	Mortgage	\$50,001 - \$100,000
SP	First Security State Bank	2012	Business liability to ANP Properties LLC	\$15,001 - \$50,000

#### SCHEDULE E: POSITIONS

Position	Name of Organization
Representative	Iowa House of Representatives

#### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

#### SCHEDULE A ASSET CLASS DETAILS

- Ashley E Hinson Revocable Trust
- Roth IRA (Owner: SP)  
DESCRIPTION: Matthew Arenholz Roth IRA - UBS
- Roth IRA  
DESCRIPTION: Ashley Hinson Arenholz Roth IRA
- Traditional IRA  
DESCRIPTION: Ashley Hinson Arenholz Traditional IRA
- Transportation Insurance & Consultants Inc 401k (Owner: SP)  
DESCRIPTION: Spouse 401k
- Uniform Transfer to Minors - Jax (Owner: DC)

LOCATION: Marion, IA, US

- Uniform Transfer to Minors - Max (Owner: DC)  
LOCATION: Marion, IA, US

### **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:** Hon. Ashley Hinson Arenholz , 08/13/2021