



Filing ID #10062715

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Hillary Scholten  
**Status:** Member  
**State/District:** MI03

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2022  
**Filing Date:** 08/13/2024  
**Period Covered:** 01/01/2021– 12/31/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 401(k) ⇒ Fidelity Freedom 2040 Fund: Class K (FSNVX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Lake Michigan Credit Union [BA]  DESCRIPTION: Checking Account		\$1,001 - \$15,000	None		
Miller Johnson 401(k) ⇒ Fidelity Emerging Markets Index Fund (FPADX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Miller Johnson 401(k) ⇒ Schwab International Index Fund - Select Shares (SWISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Miller Johnson 401(k) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Miller Johnson 401(k) ⇒ Vanguard Small-Cap Value Index Fd Admiral (VSIAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley 1 ⇒	DC	\$1,001 - \$15,000	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>
Cash [BA]					
Morgan Stanley 1 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Morgan Stanley 1 ⇒ MFS Global Equity Fund Class C (MWECX) [MF]	DC	\$1,001 - \$15,000	None		
Morgan Stanley 2 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	\$1,001 - \$15,000	None		
Morgan Stanley 2 ⇒ MFS Global Equity Fund Class C (MWECX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Morgan Stanley 3 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Morgan Stanley 3 ⇒ MFS Global Equity Fund Class C (MWECX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Mutual of America - Michigan Advocacy Program 403(b) Plan ⇒ Retirement 2035 Fund (MURJX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Previously reported as T-C Lifecycle 2045-Inst					

\* 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

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
Calvin University	Spouse salary	N/A	N/A
Miller Johnson	Salary	N/A	\$128,752.49
Institute for Nonprofit News	Spouse's consulting	N/A	N/A
John S. and James L. Knight Foundation	Spouse's consulting	N/A	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Old National Bank	2017	Home mortgage	\$100,001 - \$250,000
JT	Lake Michigan Credit Union	2019	Home equity loan	\$50,001 - \$100,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2022	Filer and Miller Johnson 401(k) Plan	Continued participation in a defined contribution plan that provides service retirement benefits.
June 2019	Filer and Michigan Advocacy Program 403(b)Plan	Continued participation in a defined contribution plan that provides service retirement benefits.

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

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Fidelity 401(k) (Owner: SP)
- Miller Johnson 401(k)
- Morgan Stanley 1 (Owner: DC)
- Morgan Stanley 2 (Owner: DC)
- Morgan Stanley 3 (Owner: DC)
- Mutual of America - Michigan Advocacy Program 403(b) Plan
- TIAA-CREF (Owner: SP)

## 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**

This report does not include a previously disclosed Thrift Savings Plan, given instructions that such disclosure is not required.

## **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. Hillary Scholten , 08/13/2024