



Filing ID #10036827

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Ben McAdams
Status: Member
State/District: UT04

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/10/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
America First Credit Union [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Citibank Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ American Funds EuroPacific Growth Fund Class R-6 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Apple Inc. (AAPL) [ST]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ DPW FID 500 INDEX INST [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Retirement ⇒ DPW FID DIVERSIFD INTL K [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ DPW VANG SM GR IDX INST [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID 500 INDEX INST [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID FREEDOM 2040 K [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID FREEDOM 2040 K [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID FREEDOM 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID FREEDOM 2045 K [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID INFLAT PROT BOND [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID INFLAT PROT BOND [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID INTL INDEX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID INTL INDEX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID SMALL CAP GROWTH [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
FID SMALL CAP GROWTH [MF]					
Retirement ⇒ FID US BOND IDX PR [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ FID US BOND IDX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Cash Reserves IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Commodity Strategies Fund CL S [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Emerging Markets Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Freedom 2040 K [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Freedom 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Global Equity Class S [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Global Infrastructure CL S [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Global Opportunities Credit Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Global Real Estate Securities S [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Inflat Prot Bond [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity International Developed Market Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Intl Index Pr [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Retirement ⇒ Fidelity iShares Core S&P 500 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Russell Inv Multi Asset Grow Strat S [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Small Cap Growth [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity Strategic Bond Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity US Small Cap Equity Class S [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Fidelity US Strategic Equity [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Main Street All Cap Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Oppenheimer Funds Capital Appreciation [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Russell Inv Unconstr Total Return Class S [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ SS US BOND INDEX II [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ State of Utah Pension [PE]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Retirement ⇒ URS BOND FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Retirement ⇒ URS INTERNATIONAL FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ URS LARGE CAP GROWTH FUND [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ URS LARGE CAP VALUE FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ URS SMALL CAP FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Vanguard Institutional Index Fund Institutional Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Retirement ⇒ Vanguard Total Bond Market Index Fund Institutional Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Salt Lake City Rental [RP] LOCATION: UT, UT, US	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Salt Lake rental [RP] LOCATION: Salt Lake City, UT, US	SP	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
USAA Checking/Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Zions bank accounts [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Coop apartment [RP] LOCATION: Washington, DC, US	JT	03/4/2019	P	\$100,001 - \$250,000	
Salt Lake City Rental [RP] LOCATION: SALT LAKE CITY, UT, US	JT	03/19/2019	S	\$100,001 - \$250,000	<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 C: EARNED INCOME

Source	Type	Amount
University of Utah	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Utah Higher Education Assistance	May 2003	Student loan	\$15,001 - \$50,000
SP	Conduent/ACS Educational Services	May 2002	Student loan for spouse	\$15,001 - \$50,000
JT	Penny Mac	2016	Rental property	\$100,001 - \$250,000
JT	Salal Credit Union	December 2018	Loan for the cost to install solar panels on personal residence	\$15,001 - \$50,000
JT	Cenlar Bank	March 2019	DC studio apartment personal residence	\$100,001 - \$250,000
JT	Specialized Loan Servicing	June 2020	Mortgage on primary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2010	Myself and the State of Utah	Pension

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
AIEF	08/4/2019	08/12/2020	Salt Lake City - Israel - Santa Ana	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"> Retirement
--

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. Ben McAdams , 08/10/2020