



Filing ID #10055498

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Kyle Kilbourn
Status: Congressional Candidate
State/District: WI07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 08/27/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Savings - Goldman Sachs ⇒ Apple Saving - Goldman Sachs [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Citi Bank Savings ⇒ Citi Bank Savings [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
IRA PLAN 9223 ⇒ Ameriprise Bank Insured Sweep Account (ABISA) [BA]		\$1,001 - \$15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ BLACKROCK TECHNOLOGY OPPTYS INSTL CL BGSIX [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ FIDELITY ADVISOR GROWTH OPPTYS CL I FAGCX [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ GOLDMAN SACHS GQG PARTNERS INTL OPPTYS INVESTOR CL GSINX [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ GUGGENHEIM TOTAL RETURN BOND INSTL CL		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
GIBIX [MF]					
IRA PLAN 9223 ⇒ INVESCO SMALL CAP VALUE CL Y VSMIX [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ JOHN HANCOCK BOND CL I JHBIX [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ JPMORGAN EQUITY INCOME CL I [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ LOCORR MACRO STRATEGIES CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ MAINSTAY MACKAY U S INFRA BOND CL I MGOIX [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ MFS VALUE CL I MEIIX [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ PGIM JENNISON GLOBAL OPPTYS CL Z PRJZX [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ PIMCO INCOME CL I2 PONPX [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA PLAN 9223 ⇒ PUTNAM SMALL CAP GROWTH CL Y PSYGX [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA PLAN 9223 ⇒ VIRTUS KAR INTL SMALL MID CAP CL I VIISX [MF]		\$15,001 - \$50,000	Tax-Deferred		
ROTH IRA PLAN 0458 ⇒ Ameriprise Bank Insured Sweep Account (ABISA) [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
ROTH IRA PLAN 0458 ⇒ BLACKROCK TACTICAL OPPTYS INSTL CL PBAIX [MF]		\$1,001 - \$15,000	Dividends	None	None
ROTH IRA PLAN 0458 ⇒ FEDERATED HERMES TOTAL RETURN BOND INSTL CL FTRBX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA PLAN 0458 ⇒		\$15,001 - \$50,000	Dividends	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
FIDELITY ADVISOR INTL CAP APPREC CL I FCPIX [MF]					
ROTH IRA PLAN 0458 ⇒ GOLDMAN SACHS GQG PARTNERS INTL OPPTYS INVESTOR CL GSINX [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA PLAN 0458 ⇒ GOLDMAN SACHS U S EQUITY DIVIDEND & PREMIUM INVESTOR CL GVIRX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA PLAN 0458 ⇒ ISHARES 20+ YR TREASURY BOND ETF TLT [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
ROTH IRA PLAN 0458 ⇒ ISHARES 7-10YR TREASURY BOND ETF IEF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA PLAN 0458 ⇒ ISHARES MSCI USA QUALITY FACTOR ETF QUAL [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA PLAN 0458 ⇒ JPMORGAN EQUITY INCOME CL I HLIEX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA PLAN 0458 ⇒ PGIM TOTAL RETURN BOND CL Z PDBZX [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
ROTH IRA PLAN 0458 ⇒ VANGUARD MID CAP ETF VO [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA PLAN 0458 ⇒ VANGUARD S&P 500 INDEX ETF VOO [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA PLAN 0458 ⇒ VANGUARD SMALL CAP ETF VB [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA PLAN 0458 ⇒ VIRTUS ALPHASIMPLEX MANAGED FUTURES STRATEGY CL I ASFYX [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
ROTH IRA PLAN 0458 ⇒ VIRTUS KAR LONG SHORT EQUITY CL I VLSIX [MF]		\$1,001 - \$15,000	Dividends	None	None
SPOUSE AND SELF JT 3863 ⇒ Ameriprise Insured Money Market (AIMMA) [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SPOUSE AND SELF JT 3863 ⇒ CONSUMER DISCRETIONARY SELECT SECTOR SPDR ETF XLY [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPOUSE AND SELF JT 3863 ⇒ ISHARES CORE MSCI EMERGING MARKETS ETF IEMG [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
SPOUSE AND SELF JT 3863 ⇒ ISHARES CORE S&P MID CAP ETF IJH [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
SPOUSE AND SELF JT 3863 ⇒ ISHARES GLOBAL ENERGY ETF IXC [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
SPOUSE AND SELF JT 3863 ⇒ SECTOR CONSUMER STAPLES SELECT SECTOR SPDR ETF XLP [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
SPOUSE AND SELF JT 3863 ⇒ SECTOR FINANCIAL SELECT SECTOR SPDR ETF XLF [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
SPOUSE AND SELF JT 3863 ⇒ SECTOR HEALTHCARE SELECT SECTOR SPDR ETF XLV [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
SPOUSE AND SELF JT 3863 ⇒ SECTOR INDUSTRIAL SELECT SECTOR SPDR ETF XLI [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPOUSE AND SELF JT 3863 ⇒ SECTOR TECHNOLOGY SELECT SECTOR SPDR ETF XLK [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
SPOUSE AND SELF JT 3863 ⇒ SELECT SECTOR COMMUNICATION SERVICES SELECT SECTOR SPDR ETF XLC [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPOUSE AND SELF JT 3863 ⇒ SPDR PORTFOLIO DEVELOPED WORLD EX-US ETF SPDW [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
SPOUSE AND SELF JT 3863 ⇒ VANGUARD SMALL CAP ETF VB [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SPOUSE AND SELF JT 7019 ⇒ BLACKROCK MULTI ASSET INCOME INSTL CL BIICX [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
SPOUSE AND SELF JT 7019 ⇒ BLACKROCK STRATEGIC INCOME OPPTYS INSTL CL BSIIX [MF]	JT	\$1,001 - \$15,000	Dividends	None	None
SPOUSE AND SELF JT 7019 ⇒ FEDERATED HERMES TOTAL RETURN BOND INSTL CL FTRBX [MF]	JT	\$1,001 - \$15,000	Dividends	None	None
SPOUSE AND SELF JT 7019 ⇒ JANUS HENDERSON MULTI SECTOR INCOME CL I JMUIX [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
SPOUSE AND SELF JT 7019 ⇒ MAINSTAY MACKAY U S INFRA BOND CL I MGOIX [MF]	JT	\$1,001 - \$15,000	Dividends	None	None
SPOUSE AND SELF JT 7019 ⇒ METROPOLITAN WEST HIGH YIELD BOND CL I MWHIX [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
SPOUSE AND SELF JT 7019 ⇒ PGIM TOTAL RETURN BOND CL Z PDBZX [MF]	JT	\$15,001 - \$50,000	Dividends	None	None
SPOUSE AND SELF JT 7019 ⇒ PUTNAM MORTGAGE OPPTYS CL Y PMOYX [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
SPOUSE IRA PLAN 4949 ⇒ Ameriprise Bank Insured Sweep Account (ABISA) [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ CONSUMER DISCRETIONARY SELECT SECTOR SPDR ETF XLY [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ ISHARES GLOBAL CLEAN ENERGY ETF ICLN [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ JPMORGAN U S SUSTAINABLE LEADERS CL I JIISX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SECTOR FINANCIAL SELECT SECTOR SPDR ETF XLF [EF]					
SPOUSE IRA PLAN 4949 ⇒ SECTOR HEALTHCARE SELECT SECTOR SPDR ETF XLV [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SECTOR TECHNOLOGY SELECT SECTOR SPDR ETF XLK [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SELECT SECTOR COMMUNICATION SERVICES SELECT SECTOR SPDR ETF XLC [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SPDR MSCI ACWI CLIMATE PARIS ALIGNED ETF NZAC [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ SPDR S&P 500 FOSSIL FUEL RESERVES FREE ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ VANGUARD ESG INTL STOCK ETF VSGX [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
SPOUSE IRA PLAN 4949 ⇒ VANGUARD SMALL CAP ETF VB [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
SPOUSE ROTH IRA PLAN 8361 ⇒ Ameriprise Bank Insured Sweep Account (ABISA) [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ BLACKROCK TACTICAL OPPTYS INSTL CL PBAIX [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
SPOUSE ROTH IRA PLAN 8361 ⇒ FEDERATED HERMES TOTAL RETURN BOND INSTL CL FTRBX [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ FIDELITY ADVISOR INTL CAP APPREC CL I FCPIX [MF]	SP	\$15,001 - \$50,000	Dividends	None	None
SPOUSE ROTH IRA PLAN 8361 ⇒ GOLDMAN SACHS GQG PARTNERS INTL OPPTYS INVESTOR CL GSINX [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SPOUSE ROTH IRA PLAN 8361 ⇒ GOLDMAN SACHS U S EQUITY DIVIDEND & PREMIUM INVESTOR CL GVIRX [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ ISHARES 20+ YR TREASURY BOND ETF TLT [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
SPOUSE ROTH IRA PLAN 8361 ⇒ ISHARES 7-10YR TREASURY BOND ETF IEF [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ ISHARES MSCI USA QUALITY FACTOR ETF QUAL [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ JPMORGAN EQUITY INCOME CL I HLIEX [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ PGIM TOTAL RETURN BOND CL Z PDBZX [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ VANGUARD MID CAP ETF VO [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ VANGUARD S&P 500 INDEX ETF VOO [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
SPOUSE ROTH IRA PLAN 8361 ⇒ VANGUARD SMALL CAP ETF VB [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ VIRTUS ALPHASIMPLEX MANAGED FUTURES STRATEGY CL I ASFYX [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
SPOUSE ROTH IRA PLAN 8361 ⇒ VIRTUS KAR LONG SHORT EQUITY CL I VLSIX [MF]	SP	\$1,001 - \$15,000	Dividends	None	None
US Bank Account ⇒ US Bank Accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200

* 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
Bright Health Management, Inc.	Spouse Salary	N/A	N/A
Wisconsin Department of Workforce Development	Spouse unemployment	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Principal Design Strategist (no longer hold)	Target Corporation

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">◦ Apple Savings - Goldman Sachs (Owner: SP) LOCATION: US◦ Citi Bank Savings (Owner: JT) LOCATION: US◦ IRA PLAN 9223 DESCRIPTION: Ameriprise IRA◦ ROTH IRA PLAN 0458 DESCRIPTION: Ameriprise IRA Roth◦ SPOUSE AND SELF JT 3863 (Owner: JT) LOCATION: US DESCRIPTION: Ameriprise Non-Qualified Managed Brokerage Account◦ SPOUSE AND SELF JT 7019 (Owner: JT) LOCATION: US DESCRIPTION: Ameriprise Non-Qualified Managed Brokerage Account◦ SPOUSE IRA PLAN 4949 (Owner: SP) DESCRIPTION: Ameriprise IRA◦ SPOUSE ROTH IRA PLAN 8361 (Owner: SP)
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DESCRIPTION: Ameriprise Roth IRA

- US Bank Account (Owner: JT)
LOCATION: 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: Kyle Kilbourn , 08/27/2023