



Filing ID #10055379

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Diane Young
Status: Congressional Candidate
State/District: MI10

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 08/12/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AFO Real Estate Fund [RE]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Arrowroot Family Office [OL] LOCATION: Rochester Hills, MI, US DESCRIPTION: Business interest in company		\$250,001 - \$500,000	None		
Capital One Money Market [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Coinbase ⇒ Ethereum [OT] DESCRIPTION: ETH		\$1,001 - \$15,000	None		
Coinbase ⇒ SHIBA [OT] DESCRIPTION: Crypto Currency		\$1 - \$1,000	None		
Fidelity 403b ⇒ Fidelity Dividend Growth [MF] DESCRIPTION: Sp 403 B Plan	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 403b ⇒ Fidelity equity Dividend [MF] DESCRIPTION: Sp 403b Plan	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity 403b ⇒ Fidelity Low Price [MF] DESCRIPTION: Sp 403b plan	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity 403b ⇒ Fidelity Money Market [MF] DESCRIPTION: Sp 403 B Plan	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity 403b ⇒ Fidelity Small Cap Index [MF] DESCRIPTION: Sp 403b Plan	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity 403b ⇒ Fidelity SP 500 [MF] DESCRIPTION: sp 403b Plan	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity 403b ⇒ Fidelity Total Market [MF] DESCRIPTION: Sp 403b Plan	SP	\$1,001 - \$15,000	Tax-Deferred		
Genisys [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Huntington Bank [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		
Schwab IRA ⇒ Baker Hughes Company (BKR) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab IRA ⇒ BND [EF] DESCRIPTION: Diane IRA		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ Cinemark Holdings Inc Cinemark Holdings, Inc. (CNK) [ST]		\$1,001 - \$15,000	None		
Schwab IRA ⇒ Citigroup, Inc. (C) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA ⇒ CPODX [MF]		\$1,001 - \$15,000	None		
Schwab IRA ⇒ DIANE IRA CASH [IH] DESCRIPTION: Diane IRA		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ Fidelity Money Market [MF] DESCRIPTION: Sp 403 B Plan		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ FRIAX [MF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Schwab IRA ⇒ GBTC [MF]		\$1,001 - \$15,000	None		
Schwab IRA ⇒ Generac Holdings Inc. (GNRC) [ST]		\$1 - \$1,000	None		
Schwab IRA ⇒ HYG [EF] DESCRIPTION: Diane IRA		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ iShares Biotechnology ETF (IBB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab IRA ⇒ QQQ [EF] DESCRIPTION: Diane IRA		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ SCHM [EF] DESCRIPTION: Diane IRA		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ SHY [EF] DESCRIPTION: Diane IRA		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ VEU [EF] DESCRIPTION: Diane IRA		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA ⇒ VIG [EF] DESCRIPTION: Diane IRA		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ VIGI [EF] DESCRIPTION: Diane IRA		\$1 - \$1,000	Tax-Deferred		
Second Property [RP] LOCATION: Ferndale, MI, US DESCRIPTION: Spouse co-signed for home for daughter	SP	\$250,001 - \$500,000	None		

* 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
Macomb Community College	Spouse Salary	\$59,000.00	\$118,271.00
Vitreous Partners (Now Arrowroot Family Office) COMMENTS: YTD is as of 6/30 for current year	Salary	\$21,972.00	\$42,266.00
Diane L. Young COMMENTS: This is misc income received from insurance policies sold to clients and reported on a Schedule C	1099 Misc Income	\$4,000.00	\$602.00
Arrowroot Fmaily Office	Buy Sell Agreement	\$50,000.00	\$50,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Genysis	Feb 2018	Mortgage	\$50,001 - \$100,000
SP	Rocket COMMENTS: Spouse co-signed on daughters mortgage	07/2022	Mortgage on daughters house	\$100,001 - \$250,000
SP	Genisys	03/2023	Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Director	Financial Planning Association
Board Director	Warren Symphony
Vice Chair	Warren Sterling Heights Democratic Club

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2023	Arrowroot Family Office (Formerly Viterous)	Business Buy Out Agreement that runs until 2026

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

Source (Name and Address)	Brief Description of Duties
Arrowroot Family Office (Marina Del Rey, CA, US)	BUY OUT OF BUSINESS
COMMENTS: Part of annual payout for sale of business	

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">Coinbase LOCATION: USFidelity 403b (Owner: SP) DESCRIPTION: 403b plan from workSchwab IRA

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: Diane Young , 08/12/2023