



Filing ID #10060060

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Carl J. Marlinga
Status: Congressional Candidate
State/District: MI10

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/7/2024
Period Covered: 01/01/2023– 04/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity ⇒ Apple Inc. (AAPL) [ST]	SP	\$15,001 - \$50,000	Required Minimum Distribution	\$5,001 - \$15,000	\$5,001 - \$15,000
Fidelity ⇒ Mastercard Incorporated (MA) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity ⇒ Simplify U.S. Equity PLUS GBTC ETF (SPBC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity ⇒ Vanguard IDX Fund [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Macomb County Employees' Retirement System [DB] [PE]		Undetermined	Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Voya State of Michigan 401(k) Plan ⇒ Stable Value Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Voya State of Michigan 401(k) Plan ⇒ State Street Bond Market Index [MF] [MF]		\$100,001 - \$250,000	Tax-Deferred		
Voya State of Michigan 401(k) Plan ⇒ State Street Global All Cap ex US [MF]		\$50,001 - \$100,000	Tax-Deferred		
Voya State of Michigan 401(k) Plan ⇒ State Street S&P 500 Index [MF] [MF]		\$50,001 - \$100,000	Tax-Deferred		
Voya State of Michigan 401(k) Plan ⇒ State Street S&P MidCap Index [MF] [MF]		\$15,001 - \$50,000	Tax-Deferred		
Voya State of Michigan 457 Plan ⇒ Jennison Large Cap Growth [MF] [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya State of Michigan 457 Plan ⇒ Prudential High Yield [MF] [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya State of Michigan 457 Plan ⇒ Stable Value Fund [MF] [MF]		\$15,001 - \$50,000	Tax-Deferred		
Voya State of Michigan 457 Plan ⇒ State Street Bond Market Index [MF] [MF]		\$100,001 - \$250,000	Tax-Deferred		
Voya State of Michigan 457 Plan ⇒ State Street Global All Cap ex US [MF] [MF]		\$50,001 - \$100,000	Tax-Deferred		
Voya State of Michigan 457 Plan ⇒ State Street S&P 500 Index [MF] [MF]		\$50,001 - \$100,000	Tax-Deferred		
Voya State of Michigan 457 Plan ⇒ State Street S&P MidCap Index [MF] [MF]		\$15,001 - \$50,000	Tax-Deferred		

* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Clients in mediation and arbitration legal practice	fees for services	\$60,464.00	\$10,384.00
State of Michigan Department of Attorney General	Contractor as Special Assistant Attorney General	\$10,440.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Citizen's Bank, N.A.	December, 2020	Home Equity Line of Credit	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Fidelity (Owner: SP)
- Voya State of Michigan 401(k) Plan
- Voya State of Michigan 457 Plan

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: Carl J. Marlinga , 05/7/2024