



Filing ID #10060417

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** M. Zuhdi Jasser  
**Status:** Congressional Candidate  
**State/District:** AZ04

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 06/28/2024  
**Period Covered:** 01/01/2023– 05/29/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AZ Center for Hematology Profit Sharing ⇒ Fidelity Vang Target Return 2040 [PE]	SP	\$50,001 - \$100,000	Tax-Deferred		
Capital Group 529 Plan ⇒ AF US Govmt Money Market [5P]  LOCATION: AZ DESCRIPTION: DEP1	DC	\$1,001 - \$15,000	Tax-Deferred		
Capital Group 529 Plan ⇒ Growth Portfolio [5P]  LOCATION: AZ DESCRIPTION: DEP2	DC	\$1,001 - \$15,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity Freedom 2035 [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity TOD ⇒ Amgen Inc. - Common Stock (AMGN) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Fidelity TOD ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jasser Revocable Trust 4/24/09 ⇒ ARK Innovation ETF (ARKK) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ DoubleLine Core Fixed Income Fund Class I (DBLFX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Eaton Vance Short Duration Inflation-Protected Income Fund Class I (EIRRX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Jasser Revocable Trust 4/24/09 ⇒ Interest Bearing Account with Bank of America [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Interpretive Translation of the Koran, LLC, 100% Interest [OL]  LOCATION: Phoenix, AZ, US DESCRIPTION: Company owns the rights to book	JT	\$15,001 - \$50,000	None		
Jasser Revocable Trust 4/24/09 ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Navy Mutual Paid Up Permanent Life [WU]	JT	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ Rental Property [RP]  LOCATION: Peoria, AZ, US	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
Jasser Revocable Trust 4/24/09 ⇒ Schwab Bank Sweep Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jasser Revocable Trust 4/24/09 ⇒ Z Leasing, LLC, 100% Interest [OL]  LOCATION: Phoenix, AZ, US DESCRIPTION: Property rental company, currently inactive	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ DFA Real Estate Securities Portfolio (DFREX) [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Invesco Diversified Dividend Funds Class A (LCEAX) [MF]	JT	\$50,001 - \$100,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Janus Henderson Triton Fund - I Shares (JSMGX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Lord Abbett High Yield Fund Class R6 (LHYVX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ PIMCO Funds Real Return Fund Institutional Class (PRRIX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Principal Fds, Inc. MidCap S&P 400 Index Fd Cl R-5 (PMFPX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Principal Fds, Inc. SmallCap S&P 600 Index Fd Cl R-4 (PSSSX) [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Vanguard Growth Index Fd Admiral Shs (VIGAX) [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Vanguard Short-Term Investment Grade Fund Investor Shrs (VFSTX) [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement ⇒ Vanguard Value Index Fd Admiral Shs (VVIAX) [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement ⇒ FID Growth Co Pool A [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement ⇒ JPM CB CR DRE 2040 CC [PE]	SP	\$50,001 - \$100,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement ⇒ JPM CB CR DRE 2045 CC [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement ⇒ JPM Smtret 2040 R6 [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		
Jasser Revocable Trust 4/24/09 ⇒ M. Zuhdi Jasser, MD PC ⇒ Bank of Montreal (BMO) [BA]	JT	\$100,001 - \$250,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Jasser Revocable Trust 4/24/09 ⇒ M. Zuhdi Jasser, MD PC ⇒ M. Zuhdi Jasser, MD PC, 100% Interest [OL]  LOCATION: Phoenix, AZ, US DESCRIPTION: This is my medical practice under the dba :Jasser Center for Comprehensive Care". My practice includes internal medicine and also nuclear stress testing and imaging.	JT	\$500,001 - \$1,000,000	S Corp Income	\$15,001 - \$50,000	\$50,001 - \$100,000
Jasser Revocable Trust 4/24/09 ⇒ Z Liberty LLC ⇒ Wells Fargo [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Jasser Revocable Trust 4/24/09 ⇒ Z Liberty LLC ⇒ Z Liberty LLC, 100% Interest [OL]  LOCATION: Phoenix, AZ, US DESCRIPTION: Professional Consulting Services	JT	\$50,001 - \$100,000	S Corp Income	\$15,001 - \$50,000	\$15,001 - \$50,000
Merrill Lynch ⇒ Invesco Emerging Markets Sovereign Debt ETF (PCY) [EF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Invesco Preferred ETF (PGX) [EF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ iShares MBS ETF (MBB) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ iShares TIPS Bond ETF (TIP) [EF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Growth ETF (VUG) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
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\* 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
M. Zuhdi Jasser MD PC	Salary	\$24,081.00	\$56,827.00
Advanced Nuclear Cardiology PLLC	Salary	\$25,385.00	\$68,150.00
Z Liberty, LLC	Salary	N/A	\$75,000.00
Honor Health	spouse salary	N/A	N/A
Banner Health Network	spouse salary	N/A	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America	June 2023	Credit Card	\$15,001 - \$50,000
JT	CHP 1010 McDowell LLC,	6/1/2018	Liability on lease through 2/28/2030	\$500,001 - \$1,000,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
President and CEO	M. Zuhdi Jasser, MD PC
President and CEO	Z Liberty, LLC
President and Director	The American Islamic Forum for Democracy
Member of board of directors	Private Practice Physicans Congress
Medical Director for Bioethics	Banner Health Network
Medical Director	Summit Healthcare Services
Member of Credentials Committee	Banner Health Network
Senior Fellow	Center for Security Policy

Position	Name of Organization
Medical Director	Canyon Home Care and Hospice
COMMENTS: Resigned August 30, 2022	
Board Member	Care Integration Network (Banner Health Network)
Board Member	Arizona Medical Association
Board Member	NotMyKid
Board Member	American Conservative Union Foundation
COMMENTS: Resigned December 2022	
Board Member	Arizona Medical Political Action Committee
COMMENTS: Resigned effective September 1, 2023	

### SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Banner Health Network (Phoenix, AZ, US)	Medical Director for Bioethics
Center for Security Policy (Washington, DC, US)	Senior fellow
COMMENTS: uncompensated as of Nov. 1, 2023	
Summit Health Care Services (Phoenix, AZ, US)	Medical Director for Home Health and Hospice
COMMENTS: Started September 2022.	
Canyon Home Health & Hospice (Gilbert, AZ, US)	Medical Director for Home Health and Hospice
COMMENTS: Completed service August of 2022	
AARP Supplemental Health Plan (Atlanta, GA, US)	Patient insurance provider
Aetna (Lexington, KY, US)	Patient insurance provider
Blue Cross Blue Shield (Phoenix, AZ, US)	Patient insurance provider
Cigna (Chattanooga, TN, US)	Patient insurance provider
Devoted Health Plan (Eagan, MN, US)	Patient insurance provider
HUMANA (Lexington, KY, US)	Patient insurance provider
BCBS MEDICARE ADVANTAGE-Medisun, (Phoenix, AZ, US)	Patient insurance provider

Source (Name and Address)	Brief Description of Duties
MEDICARE (Fargo, ND, US)	Patient insurance provider
UHC-MEDICARE ADVANTAGE AARP OPTUMCARE (Las Vegas, NV, US)	Patient insurance provider
GHI NEW YORK GROUP HEALTH (New York, NY, US)	Patient insurance provider
United Health CARE (Salt Lake City, UT, US)	Patient insurance provider
UMR (Salt Lake City, UT, US)	Patient insurance provider
HNB Echo (Westlake, OH, US)	Patient insurance provider
Healthcare Documentation Integrity Conference (Modesto, CA, US)	Patient insurance provider
AHCCCS COMPLETE CARE (Farmington, MS, US)	Patient insurance provider
AHCCCS BUFC (Phoenix, AZ, US)	Patient insurance provider
Gilsbar Inc (Covington, LA, US)	Patient insurance provider
UHC - Medicare Advantage (Salt Lake City, UT, US)	Patient insurance provider
USAA LIFE INS COMPANY (San Antonio, TX, US)	Patient insurance provider
ALLIED BENEFIT SYSTEM INC (Chicago, IL, US)	Patient insurance provider
UHC – MEDICARE ADVANTAGE BANNER (Phoenix, AZ, US)	Patient insurance provider
GEHA (Independence, MO, US)	Patient insurance provider
HUMANA CHOICE MEDICARE ADVANTAGE (Lexington, KY, US)	Patient insurance provider
AMBETTER (Farmington, MO, US)	Patient insurance provider
TRANSAMERICA (Valley Forge, VA, US)	Patient insurance provider
AHCCCS MEDICARE ADVANTAGE-DUAL COMPLETE (Kingston, NY, US)	Patient insurance provider
UHS (Salt Lake City, UT, US)	Patient insurance provider
AMERIBEN SOLUTION INC (Boise, ID, US)	Patient insurance provider
GOLDEN RULES INSURANCE (Lawrenceville, IL, US)	Patient insurance provider
MUTUAL OF OMAHA INC (Omaha, NE, US)	Patient insurance provider
AETNA SENIOR SUPPLEMENT INC (Brentwood, TN, US)	Patient insurance provider



Source (Name and Address)	Brief Description of Duties
AHCCCS MERCY CARE PLAN (Phoenix, AZ, US)	Patient insurance provider
MEDICARE ADVANTAGE ALLWELL (Farmington, MO, US)	Patient insurance provider
MEDICARE ADVANTAGE CIGNA HEALTH SPRING (Phoenix, AZ, US)	Patient insurance provider
AHCCCS UHC COMMUNITY PLAN (Kingston, NY, US)	Patient insurance provider
MEDICARE ADVANTANGE UHC-BANNER (Phoenix, AZ, US)	Patient insurance provider
Global Payments (Phoenix, AZ, US)	Patient insurance provider

SCHEDULE A INVESTMENT VEHICLE DETAILS

- ☐

AZ Center for Hematology Profit Sharing (Owner: SP)
- ☐

Capital Group 529 Plan (Owner: DC)  
LOCATION: AZ
- ☐

Fidelity IRA (Owner: SP)
- ☐

Fidelity TOD (Owner: SP)  
LOCATION: US
- ☐

Jasser Revocable Trust 4/24/09 (Owner: JT)
- ☐

Jasser Revocable Trust 4/24/09 ⇒ ADP Retirement (Owner: JT)
- ☐

Jasser Revocable Trust 4/24/09 ⇒ Banner Health Retirement (Owner: JT)
- ☐

Jasser Revocable Trust 4/24/09 ⇒ M. Zuhdi Jasser, MD PC (100% Interest) (Owner: JT)  
LOCATION: Phoenix, AZ, US  
DESCRIPTION: This is my medical practice under the dba "Jasser Center for Comprehensive Care". My practice includes internal medicine and also nuclear cardiology stress testing and imaging.
- ☐

Jasser Revocable Trust 4/24/09 ⇒ Z Liberty LLC (100% Interest) (Owner: JT)  
LOCATION: Phoenix, AZ, US  
DESCRIPTION: Professional Consulting Services
- ☐

Merrill Lynch (Owner: SP)  
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

## COMMENTS

Advanced Nuclear Cardiology is a single member LLC (diagnostic services) is not reported on Schedule A because its income is reported under M. Zuhdi Jasser, MD, PC. Both corps DBA Jasser Center for Comprehensive Care. All consulting income is reported under Z Liberty, LLC. Patients paying the practice more than \$5000 are not reported on Schedule J as this would include confidential information that is protected pursuant to HIPAA. Honor Health 403(b) account rolled over to Merrill Lynch

## 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:** M. Zuhdi Jasser , 06/28/2024