



Filing ID #10055732

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jessica Swartz
Status: Congressional Candidate
State/District: MI04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 10/30/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Gerber Grow Up Plan [WU]	DC	\$1,001 - \$15,000	None		
Jessica Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Jessica Life Insurance [WU]		\$1,001 - \$15,000	None		
DESCRIPTION: State Farm Life Insurance for Jessica					
LMSB 529 ⇒ DC 529 Tuition Plan [5P]		\$1,001 - \$15,000	None		
LOCATION: DC DESCRIPTION: DC Savings Plan					
Modern Woodmen [WU]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Life Insurance					
Retirement accounts ⇒ CREF Social Choice R2 (QCSCPX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: WESTERN MICHIGAN UNIVERSITY 403(B) TAX DEFERRED ANNUITY PLAN					
Retirement accounts ⇒ CREF Stock R2 (QCSTPX) [MF]		\$15,001 - \$50,000	None		
DESCRIPTION: Jamie's TIAA Account					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ CREF Stock R2 (QCSTPX) [MF] DESCRIPTION: Jamie's TIAA Account		\$250,001 - \$500,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity Emerging Markets Index (FPADX) [MF] DESCRIPTION: Miller Johnson Retirement Account		\$1 - \$1,000	None		
Retirement accounts ⇒ Schwab International Index (SWISX) [MF] DESCRIPTION: Miller Johnson Retirement Account		\$1 - \$1,000	None		
Retirement accounts ⇒ Schwab Small Cap Index (SWSSX) [MF] DESCRIPTION: Miller Johnson Retirement Account		\$1 - \$1,000	None		
Retirement accounts ⇒ Schwab Total Stock Market Index (SWTSX) [MF] DESCRIPTION: Miller Johnson Retirement Account		\$1,001 - \$15,000	None		
Retirement accounts ⇒ TIAA Real Estate [MF] DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	None		
Retirement accounts ⇒ TIAA Real Estate (QREARX) [MF] DESCRIPTION: Jamie's TIAA Account		\$15,001 - \$50,000	Tax-Deferred		
Retirement accounts ⇒ TIAA Traditional [MF] DESCRIPTION: Jamie's TIAA Account		\$15,001 - \$50,000	Tax-Deferred		
Retirement accounts ⇒ TIAA Traditional [MF] DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	None		
Retirement accounts ⇒ TIAA Traditional [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA Traditional [MF] DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ TIAA-CREF Bond Index Fund - Retirement Class (TBIRX) [MF] DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ TIAA-CREF Bond Index Fund - Retirement Class (TBIRX) [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF Emerging Markets Equity Index Fund - Retirement Class (TEQSX) [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF Emerging Markets Equity Index Fund - Retirement Class (TEQSX) [MF] DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ TIAA-CREF Equity Index Fund - Retirement Class (TIQRX) [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF International Equity Index Fund - Retirement Class (TRIEX) [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF International Equity Index Fund - Retirement Class (TRIEX) [MF] DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ TIAA-CREF Large-Cap Growth Index Fund - Retirement Class (TRIRX) [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF Large-Cap Value Index Fund - Retirement Class (TRCVX) [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TIAA-CREF Large-Cap Value Index Fund - Retirement Class (TRCVX) [MF] DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ TIAA-CREF S&P 500 Index Fund - Retirement Class (TESHX) [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF S&P 500 Index Fund - Retirement Class (TRSPX) [MF] DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ TIAA-CREF Short-Term Bond Index Fund - Retirement Class (TESHX) [MF] DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ TIAA-CREF Short-Term Bond Index Fund - Retirement Class (TESHX) [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF Small-Cap Blend Index Fund - Retirement Class (TRBIX) [IH] DESCRIPTION: Jamie's TIAA Account		\$1 - \$1,000	None		
Retirement accounts ⇒ TIAA-CREF Small-Cap Blend Index Fund - Retirement Class (TRBIX) [MF] DESCRIPTION: Jamie's TIAA Account		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Vanguard Mid-Cap Growth Index Admiral (VMGMX) [MF] DESCRIPTION: Miller Johnson Retirement Account		\$1 - \$1,000	None		
Retirement accounts ⇒ Vanguard Real Estate Index Admiral (VGSLX) [MF] DESCRIPTION: Miller Johnson Retirement Account		\$1 - \$1,000	None		
Retirement accounts ⇒ Vanguard Short-Term Inflation-Protected Security Index Admiral (VTAPX) [MF]		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ Vanguard Small Cap Growth Index Admiral (VSGAX) [MF]		\$1 - \$1,000	None		
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ Vanguard Small Cap Value Index Admiral (VSIAX) [MF]		\$1 - \$1,000	None		
DESCRIPTION: Miller Johnson Retirement Account					
Retirement accounts ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: MICHIGAN STATE UNIVERSITY 403(B) BASE RETIREMENT PROGRAM					
Retirement accounts ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: MICHIGAN STATE UNIVERSITY 403(B) SUPPLEMENTAL RETIREMENT PROGRAM					
Retirement accounts ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: WESTERN MICHIGAN UNIVERSITY 403(B) RETIREMENT PLAN					
Retirement accounts ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: WESTERN MICHIGAN UNIVERSITY 403(B) TAX DEFERRED ANNUITY PLAN					
Retirement accounts ⇒ Vanguard Total Bond Market Index Fund Admiral (VBTLX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ Western Asset Core Plus Bond Fund Class IS (WAPSX) [MF]		\$1,001 - \$15,000	None		
DESCRIPTION: Jamie's TIAA Account					
Retirement accounts ⇒ Western Asset Core Plus Bond Fund Class IS (WAPSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: WESTERN MICHIGAN UNIVERSITY 403(B) RETIREMENT PLAN					
Spouse Bank Account [BA]	SP	\$1,001 - \$15,000	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
Western Michigan University	spouse salary	N/A	N/A
Miller Johnson	salary	\$49,252.19	N/A
Michigan State University	salary	\$43,466.68	\$44,697.00
Western Michigan University	salary	N/A	\$77,374.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Michigan State University Federal Credit Union	August 2023	personal loan to consolidate debt at lower interest rate	\$10,000 - \$15,000

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 ASSET CLASS DETAILS

<ul style="list-style-type: none">◦ LMSB 529 LOCATION: DC◦ Retirement accounts

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?
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☐ 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: Jessica Swartz , 10/30/2023