



Filing ID #10062960

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Deborah A. Pickett
Status: Congressional Candidate
State/District: IN05

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 09/24/2024
Period Covered: 01/01/2023– 03/8/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital One 360--Savings [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Columbia Threadneedle ⇒ Columbia Acorn Fund Class I (ACRNX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Columbia Threadneedle ⇒ Columbia Acorn Fund Class I (ACRNX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Columbia Threadneedle ⇒ Columbia Acorn International Class I (ACINX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Eli Lilly Qualified Deferred Pension [DB]	SP	Undetermined	Pension Distribution	\$5,001 - \$15,000	\$15,001 - \$50,000
Fidelity Brokerage Services ⇒ Fidelity Advisor Asset Manager 40% - Class Z (FIKYX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Fifth Third Bank [BA]	SP	\$15,001 - \$50,000	None		
IU Health 401 (K) Savings Plan ⇒	SP	\$500,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IU Health 401 (K) Savings Plan [OT]		\$1,000,000			
DESCRIPTION: Spouse's IU Health 401(K) Savings Plan is invested in Vanguard Target Retire 2020 Trust Select and Vanguard Institutional Total Stock Market Index.					
Northwestern Mutual Life Insurance [WU]		\$15,001 - \$50,000	Capital Gains	None	\$15,001 - \$50,000
DESCRIPTION: Termination of a life insurance contract. The gross distribution was \$34,833.64 but the taxable amount was \$6,880.66.					
Schwab Brokerage Account ⇒ Schwab Brokerage Account [BA]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
TIAA -CREF Annuity Contract ⇒ 529 WI TIAA-CREF Principal Protection Option (VWWSX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
USAA Federal Savings Bank [BA]	JT	\$15,001 - \$50,000	None		
USAA Federal Savings Bank [BA]	SP	\$1,001 - \$15,000	None		
Vanguard ⇒ Schlumberger N.V. Common Stock (SLB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard ⇒ Vanguard Cash Reserves Federal Money Market Fund Admiral Shares (VMRXX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Vanguard ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Vanguard ⇒ Vanguard European Stock Index Fund Admiral Shares (VEUSX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Vanguard ⇒ Vanguard Health Care Fund Admiral Shares (VGHAX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Vanguard ⇒ Vanguard Inflation Protected Securities Fund Admiral Shares (VAIPX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Vanguard ⇒ Vanguard Long-Term Investment Grade Fund Admiral Shrs (VWETX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard ⇒ Vanguard Mid-Cap Growth Index Fd Admiral (VMGMX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]		\$1 - \$1,000	Tax-Deferred		
Vanguard ⇒ Vanguard Pacific Stock Index Fund Admiral Shares (VPADX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Vanguard ⇒ Vanguard Small-Cap Growth Index Fd Admiral (VSGAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Vanguard ⇒ Vanguard Treasury Money Market Fund (VUSXX) [MF]	SP	\$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
Indiana University Health Inc	spouse salary	N/A	N/A
Mitch Daniels Leadership Foundation	spouse salary	N/A	N/A
Midday Dog Walkers	spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	USAA Credit Card	January 2023	Credit card debt	\$15,001 - \$50,000
	Southwest Credit Card	January 2024	Credit card debt	\$10,000 - \$15,000
JT	Wells Fargo Home Equity Line of Credit	September 2022	Home Improvement Expenses	\$15,001 - \$50,000
JT	Subaru Motors Finance	July 2023	Auto Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
President	Rosemeade Commons Homeowners Association

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Columbia Threadneedle (Owner: SP)
- Fidelity Brokerage Services (Owner: SP)
- IU Health 401 (K) Savings Plan (Owner: SP)
- Schwab Brokerage Account
- TIAA -CREF Annuity Contract (Owner: SP)
- Vanguard
- Vanguard (Owner: SP)

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

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: Deborah A. Pickett , 09/24/2024