



Filing ID #10071766

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Haley Stevens
Status: Member
State/District: MI11

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2023
Filing Date: 08/13/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Franklin Small -Mid Cap Growth Fund Advisor Class (FSGAX) [MF]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Fundamental Investors, Class F-2 Shares (FINFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200 <input type="checkbox"/>
JPMorgan Liquid Assets Money Market Fund Capital Shares (CJLXX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200 <input type="checkbox"/>
PNC Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
PNC Bank Savings Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
RJ Bank Deposit Program [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
Vanguard Div Appreciation ETF (VIG) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Haley Stevens IRA ⇒ RJ Bank Deposit Program [BA]		\$1 - \$1,000	Tax-Deferred	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Haley Stevens IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$50,001 - \$100,000	None	<input type="checkbox"/>
ROTH IRA ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
ROTH IRA ⇒ Fidelity Advisor New Insights Fund: Class I (FINSX) [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
ROTH IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
ROTH IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>

* 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 B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Rocket Mortgage	November 2021	Home Mortgage	\$250,001 - \$500,000
	Sofi	October 2023	Home Renovations	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation Inc	08/05/2023	08/13/2023	Detroit - Tel Aviv - Detroit	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- ROTH IRA
- Haley Stevens IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Yes No

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: Hon. Haley Stevens , 08/13/2025