



Filing ID #10056941

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Mike Kennedy
Status: Congressional Candidate
State/District: UT03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 03/29/2024
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
Azova, Inc. ⇒ Azova, Inc. [PS]	SP	\$50,001 - \$100,000	Dividends	None	None
DESCRIPTION: Stock Holding in Azova, Inc.					
Bank 1 ⇒ Savings [BA]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Bank 2 ⇒ Savings [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity Investments ⇒ UUHC 401A ⇒ FID FRDM BLND 2035 [OT]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: University of Utah retirement plan					
Fidelity Investments ⇒ UUHC 403b ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 403b ⇒ Fidelity Diversified International Fund Class K (FDIKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 403b ⇒		\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Freedom Blend 2035 Fund Class K6 (FHJDX) [MF]		\$100,000			
Fidelity Investments ⇒ UUHC 457B ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 457B ⇒ Fidelity Diversified International Fund Class K (FDIKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 457B ⇒ Fidelity Freedom Blend 2035 Fund Class K6 (FHJDX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Premier Family Medical, LLC ⇒ Michael Kennedy, MD, Inc., 100% Interest [OL]	JT	\$100,001 - \$250,000	Business Income	\$15,001 - \$50,000	\$100,001 - \$1,000,000
LOCATION: UT, UT, US					
DESCRIPTION: Ownership interest in medical practice.					
Schwab accounts ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$1,001 - \$15,000	None		
Schwab accounts ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$1,001 - \$15,000	None		
Schwab accounts ⇒ Cloudflare, Inc. Class A Common Stock (NET) [ST]		\$1,001 - \$15,000	None		
Schwab accounts ⇒ EA Series Trust Strive U.S. Energy ETF (DRLL) [EF]		\$1,001 - \$15,000	None		
Schwab accounts ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	None		
State Retirement ⇒ URS Retirement Plan-401(k) Target Date 2035, 100% Interest [OT]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Utah Retirement System 401(k) invested in Target Date 2035					

* 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
State of Utah	Senator Salary	\$16,482.45	\$14,510.36
Michael Kennedy MD Inc	Medical Practice	\$33,000.00	\$90,000.00
Collaborative Care Svcs Inc	Optum Learning Session		\$337.50

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Utah State Senator	Utah State Senate
Utah County Board of Health	Utah County Board of Health
Executive Committee Member	Premier Family Medical
Officer	Michael Kennedy MD Inc
Officer	Kennedy Capital LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2024	Mike Kennedy MD Inc and Premier Family Medical	Leave of absence for Utah Legislative session and for CD 3 campaign. Resume work when CD 3 race ends or post CD 3 primary.
June 2020	Mike Kennedy and Voya Financial	Retirement account from consulting work for Utah County.
June 2014	Mike Kennedy and University of Utah	Retirement Account from time employed at the University of Utah
January 2013	Mike Kennedy and Utah Retirement Systems	Retirement Account from Utah state for legislative service.

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

Source (Name and Address)	Brief Description of Duties
Patients (Lindon, UT, US)	Physician

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Azova, Inc. (Owner: SP)
LOCATION: US
- Bank 1
LOCATION: US
- Bank 2
LOCATION: US
- Fidelity Investments
- Fidelity Investments ⇒ UUHC 401A
- Fidelity Investments ⇒ UUHC 403b
- Fidelity Investments ⇒ UUHC 457B
- Premier Family Medical, LLC (4% Interest) (Owner: JT)
LOCATION: Pleasant Grove UT, UT, US
DESCRIPTION: Premier Family Medical LLC is a medical partnership with approximately 25 members.
- Schwab accounts
- State Retirement

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: Mike Kennedy , 03/29/2024