



Filing ID #10053486

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Zach Nunn
Status: Member
State/District: IA03

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2022
Filing Date: 08/13/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|--------------------------|----------------|-------------------------------------|-----------------------------|
| ALABAMA RENTAL PROPERTY [RP] LOCATION: MONTGOMERY, AL, US | | \$250,001 - \$500,000 | Rent | Not Applicable | \$15,001 - \$50,000 |
| Child savings account [1] ⇒ IADVISOR 529 GROWTH A [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Child savings account [2] ⇒ IADVISOR 529 GROWTH A [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Child savings account [3] ⇒ IADVISOR 529 AGE 11-15 A [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Child savings account [3] ⇒ IADVISOR 529 GROWTH A [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Child savings account [4] ⇒ IADVISOR 529 AGE 11-15 A [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Child savings account [4] ⇒ IADVISOR 529 GROWTH A [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|----------------|-------------------------------|-----------------------|
| IOWA RENTAL PROPERTY [RP] | | \$100,001 - \$250,000 | Rent | Not Applicable | \$5,001 - \$15,000 |
| LOCATION: BONDURANT, IA, US | | | | | |
| NUNN ROTH IRA [1] ⇒ CHARLES SCHWAB SWEEP ACCOUNT [BA] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| NUNN ROTH IRA [1] ⇒ Sirius XM Holdings Inc. (SIRI) [ST] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| NUNN ROTH IRA [2] ⇒ FRANKLIN DYNATECH CL R6 [FDTRX] [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| NUNN ROTH IRA [2] ⇒ HARTFORD BALANCED INCOME CL F [HBLFX] [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| NUNN ROTH IRA [2] ⇒ LORD ABBETT SHORT DURATION INCOME CL F3 [LOLDX] [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| NUNN ROTH IRA [2] ⇒ PGIM TOTAL RETURN BOND CL R6 [PTRQX] [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| NUNN ROTH IRA [2] ⇒ T ROWE PRICE GLOBAL STOCK CL I [TRGLX] [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| NUNN ROTH IRA [2] ⇒ T ROWE PRICE LARGE-CAP GROWTH CL I [TRLGX] [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| NUNN ROTH IRA [2] ⇒ T ROWE PRICE U.S. TREASURY MONEY CL I [TRGXX] [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| NUNN ROTH IRA [2] ⇒ VICTORY INTEGRITY SMALL MID CAP VALUE CL R6 [MIRSX] [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| STATE OF IOWA PENSION PLAN [PE] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| TD AMERITRADE BROKERAGE ACCOUNT ⇒ VANGUARD DEVELOPED MKTS INDEX | | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|----------------|-------------------------------|-----------------------|
| ADMIRAL [VTMGX] [MF] | | | | | |
| TD AMERITRADE BROKERAGE ACCOUNT ⇒ VANGUARD GROWTH INDEX ADMIRAL [VIGAX] [MF] | | \$15,001 - \$50,000 | Dividends | Not Applicable | \$1 - \$200 |
| TD AMERITRADE BROKERAGE ACCOUNT ⇒ VANGUARD INTMD TERM BOND INDEX ADMIRAL [VBILX] [MF] | | \$1,001 - \$15,000 | Dividends | Not Applicable | \$1 - \$200 |
| TD AMERITRADE BROKERAGE ACCOUNT ⇒ VANGUARD LONG TERM BOND INDEX ADMIRAL [VBLAX] [MF] | | \$1,001 - \$15,000 | Dividends | Not Applicable | \$1 - \$200 |
| TD AMERITRADE BROKERAGE ACCOUNT ⇒ VANGUARD MORTGAGE BACKED SEC-IDX [VMBSX] [MF] | | \$1,001 - \$15,000 | Dividends | Not Applicable | \$1 - \$200 |
| TD AMERITRADE BROKERAGE ACCOUNT ⇒ VANGUARD SHORT TERM BOND INDEX ADMIRAL [VBIRX] [MF] | | \$1,001 - \$15,000 | Dividends | Not Applicable | \$1 - \$200 |
| TD AMERITRADE BROKERAGE ACCOUNT ⇒ VANGUARD SM CAP INDEX ADMIRAL [VSMAX] [MF] | | \$1,001 - \$15,000 | Dividends | Not Applicable | \$1 - \$200 |
| TD AMERITRADE BROKERAGE ACCOUNT ⇒ VANGUARD TOTAL INTL BOND INDEX ADMIRAL [VTABX] [MF] | | \$1,001 - \$15,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| TD AMERITRADE BROKERAGE ACCOUNT ⇒ VANGUARD VALUE INDEX ADMIRAL [VVIAX] [MF] | | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| USAA CHECKING ACCOUNT [1] [BA] | | \$100,001 - \$250,000 | Interest | Not Applicable | \$1 - \$200 |
| USAA CHECKING ACCOUNT [2] [BA] | | \$1,001 - \$15,000 | Interest | Not Applicable | \$1 - \$200 |
| USAA FEDERAL SAVINGS ACCOUNT [BA] | | \$15,001 - \$50,000 | Interest | Not Applicable | \$1 - \$200 |
| VANGUARD EMRG MKTS STOCK INDEX ADMIRAL [VEMAX] [MF] | | \$1,001 - \$15,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Walmart Inc. (WMT) [ST] | | None | Capital Gains | Not Applicable | \$15,001 - |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---------------------------------|-------|----------------|----------------|-------------------------------------|-----------------------------|
| COMMENTS: ASSET NO LONGER HELD. | | | | | \$50,000 |

* 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 |
|---|------------------------|-------------------------------------|--------------------------|
| STATE OF IOWA | SALARY (STATE SENATOR) | N/A | \$36,636.45 |
| COMMENTS: EARNED PRIOR TO EMPLOYMENT AT HOUSE OF REPRESENTATIVES. | | | |
| NUNN ENTERPRISES (SPOUSE) | SALARY (SPOUSE) | N/A | \$31,940.00 |
| COMMENTS: INCOME EARNED FROM SMALL BUSINESS. | | | |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|---|---------------|----------|--------------------------|
| | DOVENMUEHLE MORTGAGE, INC., SERVICER FOR CROSSCOUNTRY MORTGAGE, LLC | MAY 2021 | MORTGAGE | \$250,001 - \$500,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|--|-------------------------|
| CHAIR; CO-PRESIDENT | TASK FORCE ARGO, LLC |
| COMMENTS: VOLUNTEER BOARD AND OFFICE HOLDER. | |
| PRESIDENT (SPOUSE) | NUNN ENTERPRISES |
| COMMENTS: S-CORP OWNED AND OPERATED BY SPOUSE. | |
| CO-OWNER; VICE PRESIDENT | NUNN ENTERPRISES |
| COMMENTS: POSITION HELD PRIOR TO EMPLOYMENT AT HOUSE OF REPRESENTATIVES. | |
| STATE SENATOR | STATE OF IOWA |
| COMMENTS: POSITION HELD PRIOR TO EMPLOYMENT AT HOUSE OF REPRESENTATIVES. | |
| SQUADRON COMMANDER; DEP. GROUP | IOWA AIR NATIONAL GUARD |

COMMANDER

COMMENTS: POSITION HELD PRIOR TO EMPLOYMENT AT HOUSE OF REPRESENTATIVES.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Child savings account [1]
LOCATION: IA
- Child savings account [2]
LOCATION: IA
- Child savings account [3]
LOCATION: IA
- Child savings account [4]
LOCATION: IA
- NUNN ROTH IRA [1]
- NUNN ROTH IRA [2]
- TD AMERITRADE BROKERAGE ACCOUNT
LOCATION: US
DESCRIPTION: MANAGED BY JAMES RASBERRY.

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: Hon. Zach Nunn , 08/13/2023