



Filing ID #10052905

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Rudy Yakym III
Status: Member
State/District: IN02

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2022
Filing Date: 08/13/2023
Period Covered: 01/01/2021– 12/31/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CitiBank [BA]	JT	\$1 - \$1,000	Interest	Not Applicable	\$1 - \$200
CollegeChoice 529 Direct Savings Plan ⇒ 2030 Enrollment Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
CollegeChoice 529 Direct Savings Plan ⇒ 2033 Enrollment Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
CollegeChoice 529 Direct Savings Plan ⇒ 2036 Enrollment Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		
GLC Stabilized Income Fund I ⇒ GLC Stabilized Income Fund I [MF]	JT	\$250,001 - \$500,000	Distributions	Not Applicable	\$15,001 - \$50,000
DESCRIPTION: (Fund manager letter on file with the Committee on Ethics)					
Heartland Ventures Fund II LP ⇒ Claira [OL]	JT	\$1,001 - \$15,000	None		
LOCATION: Grand Rapids, MI, US					
DESCRIPTION: Human Resources Data Analytics					
Heartland Ventures Fund II LP ⇒	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
FIRMUS [OL]					
LOCATION: Brooklyn, NY, US DESCRIPTION: Construction Risk Mitigation					
Heartland Ventures Fund II LP ⇒ Fulfilld [OL]	JT	\$1,001 - \$15,000	None		
LOCATION: Denver, CO, US DESCRIPTION: Warehouse Management System Software					
Heartland Ventures Fund II LP ⇒ Parkade [OL]	JT	\$1,001 - \$15,000	None		
LOCATION: San Francisco, CA, US DESCRIPTION: Parking Utilization App					
Heartland Ventures Fund II LP ⇒ Parspec [OL]	JT	\$1,001 - \$15,000	None		
LOCATION: San Francisco, CA, US DESCRIPTION: Construction Product Management					
Heartland Ventures Fund II LP ⇒ ProjectMark [OL]	JT	\$1,001 - \$15,000	None		
LOCATION: San Francisco, CA, US DESCRIPTION: Construction Marketing Solutions					
Heartland Ventures Fund II LP ⇒ Third Wave Automation [OL]	JT	\$1,001 - \$15,000	None		
LOCATION: Union City, CA, US DESCRIPTION: Supply Chain Automation					
Heartland Ventures S8 LLC ⇒ StrongArm Technologies [OL]	JT	\$1,001 - \$15,000	None		
LOCATION: Brooklyn, NY, US DESCRIPTION: Workplace Safety Technology Manufacturer					
Hilltop Wealth ⇒ Invesco S&P 500 Equal Weight Technology ETF (RYT) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Hilltop Wealth ⇒ iShares Core MSCI Total International Stock ETF (IXUS) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Hilltop Wealth ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Hilltop Wealth ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF (EEMV) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Hilltop Wealth ⇒ iShares MSCI Global Min Vol Factor ETF (ACWV) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Hilltop Wealth ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Hilltop Wealth ⇒ iShares S&P Mid-Cap 400 Growth ETF (IJK) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Hilltop Wealth ⇒ SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Hilltop Wealth ⇒ SPDR S&P 500 (SPY) [EF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Hilltop Wealth ⇒ SPDR S&P Aerospace & Defense ETF (XAR) [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Hilltop Wealth ⇒ Vanguard Information Tech ETF (VGT) [EF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Kem Krest 401k ⇒ American Funds New World Fund Class R-6 (RNWGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Kem Krest 401k ⇒ MFS Mid Cap Growth Fund R6 Shares (OTCKX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Kem Krest 401k ⇒ TIAA-CREF Large-Cap Growth Index Fund Institutional Class (TILIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Lake City Bank [BA] DESCRIPTION: Personal Checking	JT	\$15,001 - \$50,000	Interest	Not Applicable	\$201 - \$1,000
RCY Holdings, Inc., 100% Interest [OL] LOCATION: Granger, IN, US DESCRIPTION: Asset Management and Real Estate Service		\$50,001 - \$100,000	Ordinary Business Income	Not Applicable	\$100,001 - \$1,000,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Real Estate LLCs ⇒ Industrial 1 [RP]	JT	\$500,001 - \$1,000,000	Rent	Not Applicable	\$15,001 - \$50,000
LOCATION: South Bend, IN, US					
Real Estate LLCs ⇒ Industrial 2 [RP]		\$250,001 - \$500,000	Rent	Not Applicable	\$5,001 - \$15,000
LOCATION: South Bend, IN, US					
Real Estate LLCs ⇒ Industrial 3 [RP]	JT	\$100,001 - \$250,000	Rent	Not Applicable	\$5,001 - \$15,000
LOCATION: Goshen, IN, US					
Real Estate LLCs ⇒ Industrial 4 [RP]	JT	\$250,001 - \$500,000	Rent	Not Applicable	\$15,001 - \$50,000
LOCATION: South Bend, IN, US					
Real Estate LLCs ⇒ Industrial 5 [RP]	JT	\$500,001 - \$1,000,000	Rent	Not Applicable	\$15,001 - \$50,000
LOCATION: Nappanee, IN, US					
Real Estate LLCs ⇒ Industrial 6 [RP]	JT	\$250,001 - \$500,000	Rent	Not Applicable	\$15,001 - \$50,000
LOCATION: Goshen, IN, US					
Real Estate LLCs ⇒ Mixed Use 1 [RP]	JT	\$100,001 - \$250,000	Rent	Not Applicable	\$5,001 - \$15,000
LOCATION: Manistee, MI, US					
Real Estate LLCs ⇒ Mixed Use 2 [RP]	JT	\$100,001 - \$250,000	Rent	Not Applicable	\$5,001 - \$15,000
LOCATION: Saint Joseph, MI, US					
Real Estate LLCs ⇒ Mixed Use 3 [RP]	JT	\$1,001 - \$15,000	None		
LOCATION: South Bend, IN, US					
Real Estate LLCs ⇒ Mixed Use 4 [RP]	JT	\$15,001 - \$50,000	None		
LOCATION: West Des Moines, IA, US					
Real Estate LLCs ⇒ Mixed Use 5 [RP]	JT	\$15,001 - \$50,000	None		
LOCATION: Carmel, IN, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Real Estate LLCs ⇒ Multi-Family 1 [RP]	JT	\$1,001 - \$15,000	None		
LOCATION: Charlotte, NC, US					
Real Estate LLCs ⇒ Multi-Family 2 [RP]	JT	\$100,001 - \$250,000	None		
LOCATION: Mundelein, IL, US					
Real Estate LLCs ⇒ Office 1 [RP]		\$100,001 - \$250,000	Rent	Not Applicable	\$5,001 - \$15,000
LOCATION: South Bend, IN, US					
Real Estate LLCs ⇒ Retail 1 [RP]		\$100,001 - \$250,000	Rent	Not Applicable	\$5,001 - \$15,000
LOCATION: Elkhart, IN, US					
Real Estate LLCs ⇒ Retail 2 [RP]	JT	\$1,000,001 - \$5,000,000	Rent	Not Applicable	\$100,001 - \$1,000,000
LOCATION: Greencastle, IN, US					
Real Estate LLCs ⇒ Andulasia, LLC ⇒ Retail A [RP]	JT	\$1,001 - \$15,000	Rent	Not Applicable	\$1 - \$200
LOCATION: Austin, TX, US					
Real Estate LLCs ⇒ Andulasia, LLC ⇒ Retail B [RP]	JT	\$1,001 - \$15,000	Rent	Not Applicable	\$1 - \$200
LOCATION: Cheyenne, WY, US					
Real Estate LLCs ⇒ Andulasia, LLC ⇒ Retail C [RP]	JT	\$1,001 - \$15,000	Rent	Not Applicable	\$1 - \$200
LOCATION: Coldwater, MI, US					
Real Estate LLCs ⇒ Andulasia, LLC ⇒ Retail D [RP]	JT	\$1,001 - \$15,000	Rent	Not Applicable	\$1 - \$200
LOCATION: New Baltimore, MI, US					
Real Estate LLCs ⇒ Andulasia, LLC ⇒ Retail E [RP]	JT	\$15,001 - \$50,000	Rent	Not Applicable	\$1 - \$200
LOCATION: Eau Claire, WI, US					
Real Estate LLCs ⇒ Andulasia, LLC ⇒ Retail F [RP]	JT	\$15,001 - \$50,000	Rent	Not Applicable	\$1 - \$200
LOCATION: Stockbridge, MI, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Real Estate LLCs ⇒ Andulasia, LLC ⇒ Retail G [RP] LOCATION: Mount Pleasant, SC, US	JT	\$15,001 - \$50,000	Rent	Not Applicable	\$1 - \$200
Real Estate LLCs ⇒ Andulasia, LLC ⇒ Retail H [RP] LOCATION: Las Vegas, NV, US	JT	\$15,001 - \$50,000	Rent	Not Applicable	\$1 - \$200
Real Estate LLCs ⇒ Andulasia, LLC ⇒ Retail I [RP] LOCATION: Las Vegas, NV, US	JT	\$15,001 - \$50,000	Rent	Not Applicable	\$1 - \$200
Residence [RP] LOCATION: Granger, IN, US	JT	\$500,001 - \$1,000,000	Rent	Not Applicable	\$5,001 - \$15,000
Straight Line Data Networks, 100% Interest [OL] LOCATION: Granger, IN, US DESCRIPTION: Network Services	SP	\$1,001 - \$15,000	Ordinary Business Income	Not Applicable	\$15,001 - \$50,000
TD Ameritrade ⇒ Treasury Bill (Mature 5/25/2023) [GS]		\$15,001 - \$50,000	None		
Treasury Direct ⇒ Treasury Bill (13-Week, Matures 2/23/23) [GS]		\$15,001 - \$50,000	None		
Treasury Direct ⇒ Treasury Bill (13-Week, Matures 3/16/23) [GS]		\$15,001 - \$50,000	None		
Treasury Direct ⇒ Treasury Bill (17-Week, Matures 4/18/23) [GS]		\$15,001 - \$50,000	None		
Treasury Direct ⇒ Treasury Bill (26-Week, Matures 6/15/23) [GS]		\$15,001 - \$50,000	None		
Treasury Direct ⇒ Treasury Bill (8-Week, Matures 1/24/23) [GS]		\$15,001 - \$50,000	None		
Treasury Direct ⇒ Treasury Bill (8-Week, Matures 1/3/23) [GS]		\$50,001 - \$100,000	None		

* 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
KemKrest	Salary	N/A	\$98,641.55
COMMENTS: The Candidate filing estimated a year-to-date amount at the time of filing. The amount reported here is derived from the 2022 W-2 and is an actual amount.			
Elkhart Christian Academy	Spouse Salary	N/A	N/A
State of Indiana	Judicial Nominating Commission Compensation	N/A	\$100.00
COMMENTS: The Candidate filing included an estimate based on the payment schedule for 2022. Due to an administrative error by the Indiana Court System, payments for eight meetings should have been made but were not. As a result, the total compensation paid for the year was \$100 for one meeting. Although an additional \$800 was earned in 2022, it will be paid in 2023.			
Indiana University South Bend	Adjunct Faculty Compensation	N/A	\$2,650.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	College Ave Student Loans (Wilmington, DE)	November 2018	Student Loan	\$10,000 - \$15,000
	MOHELA (Chesterfield, MO) - US Department of Education	August 2009	Student Loan	\$50,001 - \$100,000
JT	Horizon Bank (Michigan City, IN)	May 2021	Home Mortgage	\$250,001 - \$500,000
JT	Northwest Bank (Warren, PA)	November 2018	Mortgage on Industrial #1	\$500,001 - \$1,000,000
	Centier Bank (Merrillville, IN)	October 2020	Mortgage on Industrial #2	\$100,001 - \$250,000
JT	Lake City Bank (Warsaw, IN)	February 2017	Mortgage on Industrial #3	\$50,001 - \$100,000
JT	INOVA FCU (Elkhart, IN)	October 2021	Mortgage on Retail #2	\$1,000,001 - \$5,000,000
JT	INOVA FCU (Elkhart, IN)	October 2021	Mortgage on Industrial #4	\$500,001 - \$1,000,000
JT	Centier Bank (Merrillville, IN)	December 2020	Mortgage on Industrial #5	\$500,001 -

Owner	Creditor	Date Incurred	Type	Amount of Liability
				\$1,000,000
JT	Centier Bank (Merrillville, IN)	May 2021	Mortgage on Industrial #6	\$250,001 - \$500,000
JT	United FCU (St. Joseph, MI)	June 2017	Mortgage on Mixed Use #1	\$15,001 - \$50,000
JT	United FCU (St. Joseph, MI)	September 2020	Mortgage on Mixed Use #2	\$50,001 - \$100,000
SP	US Department of Education	August 2021	Student Loan	\$10,000 - \$15,000
JT	Centier Bank (Merrillville, IN)	December 2020	Business Line of Credit	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Manager	Up North Capital, LLC
COMMENTS: Real Estate Holdings Disclosed on Sch. A	
Member	RCY3, LLC
COMMENTS: Real Estate Holdings Disclosed on Sch. A	
Member	Cassopolis Street Investors, LLC
COMMENTS: Real Estate Holdings Disclosed on Sch. A	
Member	Camdon Park Investors, LLC
COMMENTS: Real Estate Holdings Disclosed on Sch. A	
Member	SB Industrial Investors, LLC
COMMENTS: Real Estate Holdings Disclosed on Sch. A	
Member	GLC South Bend LLC
COMMENTS: Real Estate Holdings Disclosed on Sch. A	
Officer	RCY Holdings Inc
COMMENTS: Asset Management and Real Estate Service Company Disclosed on Sch. A.	
Manager	1904 Kenmore, LLC
COMMENTS: Real Estate Holdings Disclosed on Sch. A.	
Manager	2750 Foundation, LLC
COMMENTS: Real Estate Holdings Disclosed on Sch. A.	

Position	Name of Organization
Manager	506 S Oakland, LLC COMMENTS: Real Estate Holdings Disclosed on Sch. A.
Manager	2408 LWE, LLC COMMENTS: Real Estate Holdings Disclosed on Sch. A.
Officer	Straight Line Data Networks

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- CollegeChoice 529 Direct Savings Plan
LOCATION: IN
DESCRIPTION: Administered by Indiana Education Savings Authority
- GLC Stabilized Income Fund I (Owner: JT)
LOCATION: South Bend, IN, US
- Heartland Ventures Fund II LP (Owner: JT)
DESCRIPTION: Venture Capital Fund
- Heartland Ventures S8 LLC (Owner: JT)
- Hilltop Wealth (Owner: JT)
- Kem Krest 401k
- Real Estate LLCs (Owner: JT)
LOCATION: US
- Real Estate LLCs
LOCATION: US
- Real Estate LLCs ⇒ Andulasia, LLC (Owner: JT)
LOCATION: US
- TD Ameritrade
LOCATION: US
- Treasury Direct
LOCATION: US

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. Rudy Yakym III, 08/13/2023