



Filing ID #10062930

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Dr. Amish Shah
Status: Congressional Candidate
State/District: AZ01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 09/17/2024
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
Ameritrade Roth IRA ⇒ Cash [BA]		\$50,001 - \$100,000	None		
Ameritrade Roth IRA ⇒ Fidelity® 500 Index Fund [MF]		\$100,001 - \$250,000	None		
Ameritrade Roth IRA ⇒ Vanguard International Growth Fund Investor Shares [MF]		\$1,001 - \$15,000	None		
Ameritrade Roth IRA ⇒ Vanguard Mid-Cap ETF [MF]		\$1,001 - \$15,000	None		
Ameritrade Roth IRA ⇒ Vanguard Small-Cap Growth ETF [MF]		\$1,001 - \$15,000	None		
Business Ownership ⇒ ReferWell [PS] DESCRIPTION: ReferWell is a small medical referral startup.		\$1 - \$1,000	None		
Fidelity Elective ⇒ Fidelity Contrafund Fund [MF]		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Elective ⇒ Fidelity Government Money Market Fund [MF]		\$1 - \$1,000	None		
Fidelity Elective ⇒ iShares S&P Mid-Cap 400 Value ETF [MF]		\$1 - \$1,000	None		
Fidelity Elective ⇒ SPDR S&P 500 ETF Trust [MF]		\$1 - \$1,000	None		
Fidelity Roth IRA ⇒ Fidelity Low-Priced Stock Fund [MF]		\$15,001 - \$50,000	None		
HHC 403b (Prudential) ⇒ American Funds EuroPacific Growth Fund® Class R-5 [MF]		\$15,001 - \$50,000	None		
HHC 403b (Prudential) ⇒ BlackRock Mid-Cap Growth Equity Portfolio Institutional Shares [MF]		\$15,001 - \$50,000	None		
HHC 403b (Prudential) ⇒ ClearBridge Small Cap Growth Fund Class A [MF]		\$1 - \$1,000	None		
LEK401k ⇒ Invesco International Small-Mid Company Fund Class R6 [MF]		\$15,001 - \$50,000	None		
LEK401k ⇒ PGIM High Yield Fund- Class R6 [MF]		\$15,001 - \$50,000	None		
Nationwide AZ 401k ⇒ Vanguard Extended Market Index Fund Admiral Shares [MF]		\$1,001 - \$15,000	None		
Nationwide AZ 401k ⇒ Vanguard Total International Stock Index Fund [MF]		\$1,001 - \$15,000	None		
Optum ⇒ Optum - Cash Account [BA]		\$1 - \$1,000	None		
Optum ⇒ Vanguard Small-Cap Index Fund Admiral Shares [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Sinai 403b (TIAA-Cref) ⇒ Vanguard Explorer Fund Admiral Shares MUTF: VEXRX [MF]		\$100,001 - \$250,000	None		
Sinai 403b (TIAA-Cref) ⇒ Vanguard International Growth Fund Admiral Shares [MF]		\$50,001 - \$100,000	None		
Sinai 403b (TIAA-Cref) ⇒ Vanguard International Value Fund Investor Shares [MF]		\$50,001 - \$100,000	None		
Sinai 403b (TIAA-Cref) ⇒ Vanguard PRIMECAP Fund Admiral Shares [MF]		\$100,001 - \$250,000	None		
Sinai 403b (TIAA-Cref) ⇒ Vanguard Target Retirement 2040 Fund [MF]		\$100,001 - \$250,000	None		
Sinai 403b (TIAA-Cref) ⇒ Vanguard Target Retirement 2050 Fund [MF]		\$50,001 - \$100,000	None		
Vanguard 401k ⇒ Vanguard Explorer Fund Investor Class [MF]		\$500,001 - \$1,000,000	None		

* 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
Mayo Clinic Arizona	Salary	\$70,000.00	\$150,000.00
State of Arizona	State Representative-Salary	\$4,500.00	\$28,000.00
TEC AZ Physicians	Salary	N/A	\$17,740.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Arizona College of Emergency Physicians

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Ameritrade Roth IRA
- Business Ownership
LOCATION: US
- Fidelity Elective
LOCATION: US
- Fidelity Roth IRA
- HHC 403b (Prudential)
- LEK401k
- Nationwide AZ 401k
- Optum
LOCATION: US
DESCRIPTION: Health Savings Account
- Sinai 403b (TIAA-Cref)
- Vanguard 401k

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: Dr. Amish Shah , 09/17/2024