



Filing ID #10040200

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. John Curtis
Status: Member
State/District: UT03

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2020
Filing Date: 08/13/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
1260 West 1650 North, Springville UT (Loan) [RP]		\$500,001 - \$1,000,000	Interest	None <input type="checkbox"/>
LOCATION: Springville, UT, US				
2120 North 400 East [RP]		\$1,000,001 - \$5,000,000	Interest	\$1,001 - \$2,500 <input type="checkbox"/>
LOCATION: North Ogden, UT, US				
Action Commercial Park, LLC, 3411 Mountain Vista Parkway [RP]		\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000 <input type="checkbox"/>
LOCATION: Provo, UT, US				
AmBank Checking Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200 <input type="checkbox"/>
AMBFX - American Balanced Fund Class F-2 [MF]		None	Dividends	\$201 - \$1,000 <input type="checkbox"/>
Ameritrade ⇒ Zoom Video Communications, Inc. - Class A (ZM) [ST]		\$15,001 - \$50,000	None	<input checked="" type="checkbox"/>
ATI Founders, Inc. (shooting range equipment) - [OL]		\$500,001 - \$1,000,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
LOCATION: Provo, UT, US DESCRIPTION: Shooting range equipment				
Bear Lake Rental #7, 2176 S. Bear Lake Blvd. [RP]		\$100,001 - \$250,000	Rent	\$2,501 - \$5,000 <input type="checkbox"/>
LOCATION: Garden City, UT, US				
Building Lot [RP]		\$250,001 - \$500,000	None	<input type="checkbox"/>
LOCATION: Provo, UT, US				
Curtis Family Georgetown Condo, LLC, 395 West 4650 North [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000 <input type="checkbox"/>
LOCATION: Provo, UT, US				
Curtis Family Trust ⇒ 786 S 1600 W Street [RP]		\$500,001 - \$1,000,000	None	<input type="checkbox"/>
LOCATION: Provo, UT, US				
Curtis Family Trust ⇒ Parcel #16-044-0006 [RP]		\$250,001 - \$500,000	None	<input type="checkbox"/>
LOCATION: Weber County, UT, US				
Curtis Family Trust ⇒ Parcel #9-8-19-13 [RP]		\$1,001 - \$15,000	None	<input type="checkbox"/>
LOCATION: Kane County, UT, US				
Curtis Family Trust ⇒ Vacant Lot [RP]		\$1 - \$1,000	None	<input type="checkbox"/>
LOCATION: Brighton, UT, US				
Curtis Family Trust ⇒ Zions Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
Curtis Family Trust ⇒ Zions Bank Money Market Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200 <input type="checkbox"/>
Domo, Inc. - Class B (DOMO) [ST]		\$15,001 - \$50,000	None	<input type="checkbox"/>
Influence Int'l Inc. - business relationship development services - Provo, UT [PS]		\$15,001 - \$50,000	None	<input type="checkbox"/>
DESCRIPTION: Business relationship development services				
John Reem Curtis, 800 S Center SPE, LLC [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000 <input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
LOCATION: Orem, UT, US				
Monticello Development Company, LLC - unimproved land [RP]		\$15,001 - \$50,000	None	<input type="checkbox"/>
LOCATION: Monticello, UT, US				
Netflix, Inc. (NFLX) [ST]		None	None	<input type="checkbox"/>
Northwestern Mutual ⇒ AGG - iShares Core US Aggregate Bond [HE]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Northwestern Mutual ⇒ DODIX - Dodge & Cox Income Fund [MF]		None	Capital Gains, Dividends	\$1,001 - \$2,500 <input checked="" type="checkbox"/>
Northwestern Mutual ⇒ DODIX - DODGE & COX INCOME FUND [MF]		\$15,001 - \$50,000	None	<input type="checkbox"/>
Northwestern Mutual ⇒ IAU - iShares Gold Trust [EF]		\$15,001 - \$50,000	None	<input type="checkbox"/>
Northwestern Mutual ⇒ IEFA - iShares Core MSCI EAFE [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000 <input checked="" type="checkbox"/>
Northwestern Mutual ⇒ IEMG - iShares Core MSCI Emerging Markets [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500 <input checked="" type="checkbox"/>
Northwestern Mutual ⇒ IJH - iShares Core S&P Mid-Cap [EF]		None	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual ⇒ IJR - iShares Core S&P Small-Cap [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual ⇒ IIVV - iShares Core S&P 500 [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000 <input type="checkbox"/>
Northwestern Mutual ⇒ PCLPX - PIMCO COMMODITIES PLUS STRATEGY FUND CLASS I-2 [MF]		\$15,001 - \$50,000	None	<input type="checkbox"/>
Northwestern Mutual ⇒ PFPMX - Parnassus Mid Cap Fund Instl Class [MF]		\$15,001 - \$50,000	None	<input type="checkbox"/>
Northwestern Mutual ⇒ PIFZX - PGIM Short-Term Corporate Bond Fund Class Z		\$1,001 - \$15,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
[HE]				
Northwestern Mutual ⇒ TIP - iShares Trust TIPS Bond [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Northwestern Mutual ⇒ Vanguard Total Bond Market Index Fund Institutional Shares [MF]		None	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual ⇒ VBTXL - VANGUARD TOTAL BD MKT IDX FUND [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200 <input type="checkbox"/>
Northwestern Mutual ⇒ VEA - Vanguard Developed Markets Index Fund [MF]		None	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual ⇒ VEA - Vanguard Developed Markets Index Fund [EF]		None	Dividends	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual ⇒ VNQ - Vanguard Real Estate Index Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual ⇒ VO - Vanguard Mid-Cap Index Fund [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Abbott Laboratories (ABT) [ST]	JT	\$1,001 - \$15,000	None	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Activision Blizzard, Inc (ATVI) [ST]	JT	\$1,001 - \$15,000	None	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Adobe Inc. (ADBE) [ST]	JT	\$1,001 - \$15,000	None	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ AGG - iShares Core US Aggregate Bond [EF]	JT	\$1,001 - \$15,000	Capital Gains	\$1 - \$200 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ ALLEGHENY CNTY PA GO BDS C-69 5.000% 12/01/25 B/E DTD 10/11/12 CLB CLB 12/01/22 @100.000 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Alleghany County, Pennsylvania				
Northwestern Mutual - Joint ⇒ American Express Company (AXP) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒	JT	\$1,001 - \$15,000	Dividends	\$1 - <input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Anthem, Inc. (ANTM) [ST]				\$200
Northwestern Mutual - Joint ⇒ Apple Inc. (AAPL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Applied Materials, Inc. (AMAT) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Bank of America Corporation (BAC) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Becton, Dickinson and Company (BDX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ BlackRock, Inc. (BLK) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Boston Scientific Corporation (BSX) [ST]	JT	\$1,001 - \$15,000	None	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ CALIFORNIA ST GO VAR PURP REF BDS 4.000% 03/01/37 B/E DTD [CS] DESCRIPTION: California	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ CALIFORNIA ST UNIV REV BDS 2018 A 5.000% 11/01/35 B/E [CS] DESCRIPTION: California	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Chevron Corporation (CVX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Citigroup, Inc. (C) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ CME Group Inc. - Class A (CME) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ COLO-NESCO CMNTY SCHDIST IOWA GO BDS 2020 3.000% 06/01/31 [CS] DESCRIPTION: Colo-Nesco Community School District, Iowa	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒	JT	\$1,001 - \$15,000	Interest	\$1 - <input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Colorado Springs Colo Utils Rev Util Sys Ref Rev Bds 2012B 5.000% 11/15/24 B/E [CS]				\$200
DESCRIPTION: Colorado Springs, CO				
Northwestern Mutual - Joint ⇒ COLORADO ST CTFS PARTN RURAL COPS 2020 A 4.000% 12/15/37 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Colorado				
Northwestern Mutual - Joint ⇒ Comcast Corporation - Class A (CMCSA) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Costco Wholesale Corporation (COST) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ CSX Corporation (CSX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Danaher Corporation (DHR) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Deere & Company (DE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Facebook, Inc. - Class A (FB) [ST]	JT	\$15,001 - \$50,000	None	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ FLORIDA ST BRD ED PUB ED OUTLAY REF BDS [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Florida				
Northwestern Mutual - Joint ⇒ General Municipal Mny Mkt Cl A [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ HENDERSON COUNTY NC LTD OBLIG BDS 2020 4.000% 06/01/34 B/E DTD [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Henderson County, NC				
Northwestern Mutual - Joint ⇒ HENNEPIN CNTY MINN GO SALES TAX REV BDS 2019 B 5.000% 12/15/39 B/E [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Hennepin County, MN				
Northwestern Mutual - Joint ⇒ Home Depot, Inc. (HD) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ Honeywell International Inc. (HON) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ IAU - iShares Gold Trust [EF]	JT	\$15,001 - \$50,000	None	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IEFA - iShares Core MSCI EAFE [EF]	JT	\$250,001 - \$500,000	Capital Gains	\$5,001 - \$15,000 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IEMG - iShares Core MSCI Emerging Markets [EF]	JT	\$100,001 - \$250,000	Capital Gains	\$2,501 - \$5,000 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IJR - iShares Core S&P Small-Cap [EF]	JT	\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Intel Corporation (INTC) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Intercontinental Exchange Inc. (ICE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Intuitive Surgical, Inc. (ISRG) [ST]	JT	\$1,001 - \$15,000	None	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ IIVV - iShares Core S&P 500 [EF]	JT	\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ JACKSON MICH LTD TAX GO CAP IMPT BDS 2018 5.000% 06/01/31 B/E DTD [CS] DESCRIPTION: Jackson, MI	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ LAKEVILLE MINN INDPT SCH DIST NO 194 GO SCH BLDG REF BDS 2016 A 5.000% 02/01/23 B/E DTD [CS] DESCRIPTION: Lakeville, MN	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Lam Research Corporation (LRCX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒	JT	\$1,001 - \$15,000	Dividends	\$201 - <input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Las Vegas Sands Corp. (LVS) [ST]				\$1,000
Northwestern Mutual - Joint ⇒ Lockheed Martin Corporation (LMT) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ MAPTX - Matthews Pacific Tiger Fund Investor Class [MF]	JT	\$50,001 - \$100,000	Capital Gains	\$1 - \$200 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Mastercard Incorporated (MA) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ MEDINA OH LTD TAX REF BDS 2013A 3.000% 12/01/26 B/E DTD [CS] DESCRIPTION: Medina, OH	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ MESA ARIZ UTIL SYS REV REV BDS 2011 5.000% 07/01/35 B/E DTD 06/02/11 CLB CLB 07/01/21 [CS] DESCRIPTION: Mesa, AZ	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ MILLERSBURG PA AREA SCH DIST GO BDS 2020 5.000% 10/01/23 B/E DTD [CS] DESCRIPTION: Millersburg, PA	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ MISSISSIPPI ST GO BDS 2019 B 4.000% 10/01/36 [CS] DESCRIPTION: Mississippi	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Monster Beverage Corporation (MNST) [ST]	JT	\$1,001 - \$15,000	None	<input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Nike, Inc. (NKE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ NVIDIA Corporation (NVDA) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ ONslow Cnty N C LTD OBLIG LTD OBLIG BDS 2016 4.000% 10/01/35 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Onslow County, NC				
Northwestern Mutual - Joint ⇒ PCLPX - PIMCO COMMODITIES PLUS STRATEGY FUND CLASS I-2 [MF]	JT	\$15,001 - \$50,000	None	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PEARLAND TEX WTRWKS & SWR SYS REV REV AND REF BDS 2017 C 5.000% 09/01/23 B/E DTD 08/01/17 N/C [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Pearland, TX				
Northwestern Mutual - Joint ⇒ Pepsico, Inc. (PEP) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ PFPMX - Parnassus Mid Cap Fund Instl Class [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$1 - \$200 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PIFZX - PGIM Short-Term Corporate Bond Fund Class Z [MF]	JT	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PONPX - PIMCO Income Fund Class I-2 [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PRINCE GEORGES CNTY MD GO CONS PUB IMPT BDS 2014A 4.000% 09/01/32 B/E DTD 09/30/14 CLB CLB 09/01/24 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Prince George's County, MD				
Northwestern Mutual - Joint ⇒ Procter & Gamble Company (PG) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Progressive Corporation (PGR) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ S&P Global Inc. (SPGI) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Salesforce.com Inc (CRM) [ST]	JT	\$15,001 - \$50,000	None	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ SANGAMON LOGAN & MENARD CNTYS ILL CMNTY [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Sangamon, Logan, & Menard County, IL				
Northwestern Mutual - Joint ⇒ SANTA CRUZ CNTY ARIZ UNI SCH DIST NO 35 IMPT BDS PROJ OF 2019 2020 A 5.000% 07/01/22 B/E [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Santa Cruz County, Arizona				
Northwestern Mutual - Joint ⇒ SARATOGA SPRINGS UTAH WTR REV REF BDS 2014 3.000% 12/01/24 B/E DTD [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Saratoga Springs, UT				
Northwestern Mutual - Joint ⇒ SKAGIT CNTY WASH CONS SCH DIST NO 320 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Skagit County, WA				
Northwestern Mutual - Joint ⇒ SKIRX - DWS Enhanced Commodity Strategy Fund Instl Class [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Starbucks Corporation (SBUX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ SULLIVAN CNTY PA SCH DIST GO NTS 2020 3.000% 04/01/28 B/E DTD 07/07/20 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Sullivan County, PA				
Northwestern Mutual - Joint ⇒ Sysco Corporation (SYY) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ Texas Instruments Incorporated (TXN) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ TEXAS WATER DEV BRD ST REVOLVING FD REV BDS 2020 4.000% 08/01/34 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Texas				
Northwestern Mutual - Joint ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ TIP - iShares Trust TIPS Bond [EF]	JT	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000 <input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Northwestern Mutual - Joint ⇒ TULSA CNTY OKLA INDPT SCH DIST NO 001 TULSA COMBINED PURP BDS 2016 B 2.000% 08/01/21 B/E DTD 08/01/16 [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Tulsa County, Oklahoma				
Northwestern Mutual - Joint ⇒ Union Pacific Corporation (UNP) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ VAW - Vanguard Materials Index Fund [EF]	JT	\$1,001 - \$15,000	Capital Gains	\$1 - \$200 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ Visa Inc. (V) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ VNZ - Vanguard Real Estate Index Fund [EF]	JT	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VO - Vanguard Mid-Cap Index Fund [EF]	JT	\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VPU - Vanguard Utilities Index Fund [EF]	JT	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000 <input type="checkbox"/>
Northwestern Mutual - Joint ⇒ WASHINGTON ST UNIV REV GEN REV AND REF BDS 2013 5.000% 10/01/22 B/E DTD 04/02/13 N/C [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Washington State				
Northwestern Mutual - Joint ⇒ Waste Management, Inc. (WM) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - Joint ⇒ WAUKESHA WIS NT ANTIC NTS 2020C 3.00% 07/01/21 B/E DTD [CS]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200 <input checked="" type="checkbox"/>
DESCRIPTION: Waukesha, WI				
Northwestern Mutual - Joint ⇒ Zoetis Inc. Class A (ZTS) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200 <input checked="" type="checkbox"/>
Northwestern Mutual - SC ⇒ AGG - iShares Core US Aggregate Bond [HE]	SP	\$1 - \$1,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Northwestern Mutual - SC ⇒ DODIX - DODGE & COX INCOME FUND [HE]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IAU - iShares Gold Trust [EF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IEFA - iShares Core MSCI EAFE [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IEMG - iShares Core MSCI Emerging Markets [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IJR - iShares Core S&P Small-Cap [HE]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IVV - iShares Core S&P 500 [HE]	SP	\$15,001 - \$50,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ PCLPX - PIMCO COMMODITIES PLUS STRATEGY FUND CLASS I-2 [HE]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ PFPMX - Parnassus Mid Cap Fund Instl Class [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ PIFZX - PGIM Short-Term Corporate Bond Fund Class Z [HE]	SP	\$1 - \$1,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ TIP - iShares Trust TIPS Bond [EF]	SP	\$1 - \$1,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VBTIX - VANGUARD TOTAL BD MKT IDX FUND [HE]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VNQ - Vanguard Real Estate Index Fund [HE]	SP	\$1 - \$1,000	None	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VO - Vanguard Mid-Cap Index Fund [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Peak Ventures Fund II, L.P. [HE]		\$500,001 - \$1,000,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
QQUV Investments 2, LLC (Quick Quack Car Wash) [OL]		\$15,001 - \$50,000	None	<input type="checkbox"/>
LOCATION: Pleasant Grove & Orem, UT, US				
DESCRIPTION: Car wash				
QQUV Investments 3, LLC (Quick Quack Car Wash) [OL]		\$15,001 - \$50,000	None	<input type="checkbox"/>
LOCATION: Springville & Spanish Fork, UT, US				
DESCRIPTION: Car wash				
QQUV Investments, LLC (Quick Quack Car Wash) [OL]		\$15,001 - \$50,000	None	<input type="checkbox"/>
LOCATION: Highland & American Fork, UT, US				
DESCRIPTION: Car wash				
Residential Propertyin Washington, DC [RP]		\$250,001 - \$500,000	Rent	\$2,501 - \$5,000 <input type="checkbox"/>
LOCATION: Washington, DC, US				
Rise Broadband stock - fixed wireless Internet service provider - Denver, CO [PS]		\$15,001 - \$50,000	None	<input type="checkbox"/>
DESCRIPTION: Internet service provider				
Scott Roberts - loan - Saratoga Springs, UT [OT]		\$50,001 - \$100,000	Interest	\$201 - \$1,000 <input type="checkbox"/>
DESCRIPTION: Loan				
Splunk Inc. (SPLK) [ST]		None	None	<input type="checkbox"/>
Sundance Debt Partners, LLC [OL]		\$100,001 - \$250,000	None	<input type="checkbox"/>
LOCATION: Salt Lake City, UT, US				
DESCRIPTION: Real estate firm				
TriState Capital Holdings, Inc. (TSC) [OT]		\$250,001 - \$500,000	None	<input type="checkbox"/>
DESCRIPTION: Stock Account Collateral				
Wells Fargo Interest Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
Wells Fargo Money Market Savings Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200 <input type="checkbox"/>
Zions Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Zions Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
Zions Bank Checking Plus Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200 <input type="checkbox"/>

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Abbott Laboratories (ABT) [ST]		03/27/2020	P	\$1,001 - \$15,000	
ACKSON MICH LTD TAX GO CAP IMPT BDS 2018 5.000% 06/01/31 B/E DTD 06/28/18 CLB CLB 06/01/26 @100.000 BAM [CS]		04/14/2020	P	\$1,001 - \$15,000	
DESCRIPTION: ACKSON, MICHIGAN					
Activision Blizzard, Inc (ATVI) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Adobe Inc. (ADBE) [ST]		03/27/2020	P	\$1,001 - \$15,000	
ALLEGHENY CNTY PA GO BDS C-69 5.000% 12/01/25 B/E DTD 10/11/12 CLB CLB 12/01/22 @100.000 [CS]		04/9/2020	P	\$1,001 - \$15,000	
DESCRIPTION: ALLEGHENY COUNTY, PA					
Alphabet Inc. - Class A (GOOGL) [ST]		03/27/2020	P	\$15,001 - \$50,000	
Alphabet Inc. - Class A (GOOGL) [ST]		10/9/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Amazon.com, Inc. (AMZN) [ST]		03/4/2020	P	\$1,001 - \$15,000	
Amazon.com, Inc. (AMZN) [ST]		03/27/2020	P	\$15,001 - \$50,000	
Amazon.com, Inc. (AMZN) [ST]		10/9/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
AMBFX - American Balanced Fund Class F-2 [MF]		03/25/2020	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
American Express Company (AXP) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Anthem, Inc. (ANTM) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Apple Inc. (AAPL) [ST]		03/27/2020	P	\$15,001 - \$50,000	
Applied Materials, Inc. (AMAT) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Atlassian Corporation Plc - Class A Ordinary Shares (TEAM) [ST]		03/4/2020	P	\$1,001 - \$15,000	
Atlassian Corporation Plc - Class A Ordinary Shares (TEAM) [ST]		10/9/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Bank of America Corporation (BAC) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Becton, Dickinson and Company (BDX) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Berkshire Hathaway Inc. New (BRK.B) [ST]		03/27/2020	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	08/13/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
BlackRock, Inc. (BLK) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Boston Scientific Corporation (BSX) [ST]		03/27/2020	P	\$1,001 - \$15,000	
CALIFORNIA ST GO VAR PURP REF BDS 4.000% 03/01/37 B/E DTD [CS]		04/21/2020	P	\$1,001 - \$15,000	
DESCRIPTION: CALIFORNIA					
CALIFORNIA ST UNIV REV BDS 2018 A 5.000% 11/01/35 B/E [CS]		05/11/2020	P	\$1,001 - \$15,000	
DESCRIPTION: California					
Chevron Corporation (CVX) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Citigroup, Inc. (C) [ST]	JT	08/13/2020	P	\$1,001 - \$15,000	
CME Group Inc. - Class A (CME) [ST]		03/27/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
COLO-NESCO CMNTY SCHDIST IOWA GO BDS 2020 3.000% 06/01/31 [CS]		06/16/2020	P	\$1,001 - \$15,000	
DESCRIPTION: Colo-Nesco Community School District, Iowa					
Colorado Springs Colo Utils Rev Util Sys Ref Rev Bds 2012B 5.000% 11/15/24 B/E [CS]		04/2/2020	P	\$1,001 - \$15,000	
DESCRIPTION: Colorado Springs, CO Utilities					
COLORADO ST CTFS PARTN RURAL COPS 2020 A 4.000% 12/15/37 [CS]		06/9/2020	P	\$1,001 - \$15,000	
DESCRIPTION: COLORADO					
Comcast Corporation - Class A (CMCSA) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Costco Wholesale Corporation (COST) [ST]		03/27/2020	P	\$1,001 - \$15,000	
CSX Corporation (CSX) [ST]	JT	08/13/2020	P	\$1,001 - \$15,000	
Danaher Corporation (DHR) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Deere & Company (DE) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Facebook, Inc. - Class A (FB) [ST]		03/27/2020	P	\$15,001 - \$50,000	
FLORIDA ST BRD ED PUB ED OUTLAY REF BDS 2012C 4.000% 06/01/30 B/E DTD 08/23/12 CLB CLB 06/01/22 @100.000 [CS]		04/9/2020	P	\$1,001 - \$15,000	
DESCRIPTION: FLORIDA STATE					
Hannon Armstrong Sustainable Infrastructure Capital, Inc. (HASI) [ST]		03/4/2020	P	\$1,001 - \$15,000	
Hannon Armstrong Sustainable Infrastructure Capital, Inc. (HASI) [ST]		10/9/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
HENDERSON COUNTY NC LTD OBLIG BDS 2020 4.000% 06/01/34 B/E DTD [CS]		04/30/2020	P	\$1,001 - \$15,000	
DESCRIPTION: HENDERSON COUNTY, NC					
HENNEPIN CNTY MINN GO SALES TAX REV BDS 2019 B 5.000% 12/15/39 B/E [CS]		05/8/2020	P	\$1,001 - \$15,000	
DESCRIPTION: Hennepin County, MN					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Home Depot, Inc. (HD) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Honeywell International Inc. (HON) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Intel Corporation (INTC) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Intercontinental Exchange Inc. (ICE) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Intuitive Surgical, Inc. (ISRG) [ST]		03/27/2020	P	\$1,001 - \$15,000	
JACKSON MICH LTD TAX GO CAP IMPT BDS 2018 5.000% 06/01/31 B/E DTD [CS]		04/14/2020	P	\$1,001 - \$15,000	
DESCRIPTION: JACKSON, MI					
JP Morgan Chase & Co. (JPM) [ST]		03/27/2020	P	\$1,001 - \$15,000	
LAKEVILLE MINN INDPT SCH DIST NO 194 GO SCH BLDG REF BDS 2016 A 5.000% 02/01/23 B/E DTD 05/05/16 N/C [CS]		04/7/2020	P	\$1,001 - \$15,000	
DESCRIPTION: LAKEVILLE, MINNESOTA					
Lam Research Corporation (LRCX) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Las Vegas Sands Corp. (LVS) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Lockheed Martin Corporation (LMT) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Mastercard Incorporated (MA) [ST]		03/27/2020	P	\$1,001 - \$15,000	
MEDINA OH LTD TAX REF BDS 2013A 3.000% 12/01/26 B/E DTD [CS]		04/23/2020	P	\$1,001 - \$15,000	
DESCRIPTION: MEDINA, OH					
Merck & Company, Inc. Common Stock (MRK) [ST]		03/27/2020	P	\$1,001 - \$15,000	
MESA ARIZ UTIL SYS REV REV BDS 2011 5.000% 07/01/35 B/E DTD 06/02/11 CLB CLB 07/01/21 @100.000 [CS]		04/2/2020	P	\$1,001 - \$15,000	
DESCRIPTION: MESA, ARIZONA					
Microsoft Corporation (MSFT) [ST]		03/11/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Microsoft Corporation (MSFT) [ST]		03/27/2020	P	\$15,001 - \$50,000	
Microsoft Corporation (MSFT) [ST]		10/9/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MILLERSBURG PA AREA SCH DIST GO BDS 2020 5.000% 10/01/23 B/E DTD [CS]		04/16/2020	P	\$1,001 - \$15,000	
DESCRIPTION: MILLERSBURG, PA					
MISSISSIPPI ST GO BDS 2019 B 4.000% 10/01/36 [CS]		06/22/2020	P	\$1,001 - \$15,000	
DESCRIPTION: Mississippi					
Monster Beverage Corporation (MNST) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Nike, Inc. (NKE) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Northwestern Mutual ⇒ DODIX - Dodge & Cox Income Fund [MF]		03/19/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Northwestern Mutual ⇒ IAU - iShares Gold Trust [EF]		04/28/2020	P	\$1,001 - \$15,000	
Northwestern Mutual ⇒ IAU - iShares Gold Trust [EF]		09/2/2020	P	\$1,001 - \$15,000	
Northwestern Mutual ⇒ IEF - iShares 7-10 Year Treasury Bond [EF]		03/20/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ IEF - iShares 7-10 Year Treasury Bond [EF]		04/27/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ IEFA - iShares Core MSCI EAFE [EF]		03/23/2020	P	\$1,001 - \$15,000	
Northwestern Mutual ⇒ IEFA - iShares Core MSCI EAFE [EF]		05/1/2020	P	\$100,001 - \$250,000	
Northwestern Mutual ⇒ IEMG - iShares Core MSCI Emerging Markets [EF]		03/23/2020	P	\$1,001 - \$15,000	
Northwestern Mutual ⇒ IEMG - iShares Core MSCI Emerging Markets [EF]		04/30/2020	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual ⇒ IJH - iShares Core S&P Mid-Cap [EF]		05/14/2020	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Northwestern Mutual ⇒ IIV - iShares Core S&P 500 [EF]		04/3/2020	P	\$1,001 - \$15,000	
Northwestern Mutual ⇒ PFPMX - Parnassus Mid Cap Fund Institutional Shares [MF]		04/14/2020	P	\$1,001 - \$15,000	
Northwestern Mutual ⇒ PFPMX - Parnassus Mid Cap Fund Institutional Shares [EF]		05/13/2020	P	\$15,001 - \$50,000	
Northwestern Mutual ⇒ PIMIX - PIMCO Income Fund Institutional Class [MF]		03/19/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ PIMIX - PIMCO Income Fund Institutional Class [MF]		04/14/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ SKIRX - DWS Enhanced Commodity Strategy Fund - Class Inst [MF]		04/27/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ SKIRX - DWS Enhanced Commodity Strategy Fund - Class Inst [EF]		09/1/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ TIP - iShares TIPS Bond [EF]		04/27/2020	P	\$1,001 - \$15,000	
Northwestern Mutual ⇒ VBTIX - Vanguard Total Bond Market Index Fund Institutional Shares [MF]		03/19/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ VEA - Vanguard Developed Markets Index Fund [EF]		05/1/2020	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Northwestern Mutual ⇒ VIPIX - Vanguard Inflation-Protected Securities Fund Institutional Shares [MF]		04/24/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual ⇒ VO - Vanguard Mid-Cap Index Fund [EF]		03/23/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual ⇒ VO - Vanguard Mid-Cap Index Fund [EF]		05/14/2020	P	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual ⇒ VWO - Vanguard Emerging Markets Stock Index Fund [EF]		04/30/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ AGG - iShares Core US Aggregate Bond [EF]	JT	03/27/2020	P	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ AMBFX - American Funds American Balanced Fund Class F-2 [MF]	JT	03/26/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ BSIX - BlackRock Strategic Income Opportunities Portfolio Institutional [MF]	JT	03/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ CAIFX - American Funds Capital Income Builder Class F-2 [MF]	JT	03/26/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ CSSPX - Cohen & Steers Global Realty Shares, Inc. Class I [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ FCSZX - Franklin Convertible Securities Fund Advisor Class [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ FFRIX - Fidelity Advisor Floating Rate High Income Fund Class I [MF]	JT	03/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ FGMNX - Fidelity GNMA Fund [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ FIRIX - Fidelity Advisor International Real Estate Fund Class I [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ FLVCX - Fidelity Leveraged Company Stock Fund [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ FRIAX - Franklin Income Fund Advisor Class [MF]	JT	03/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ FSMAX - Fidelity Extended Market Index Fund [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ FSPSX - Fidelity International Index Fund [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ General Municipal Mny Mkt Cl A [BA]	JT	12/1/2020	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ GFFFX - American Funds The Growth Fund of America Class F-2 [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ HLIPX - JPMorgan Core Plus Bond Fund Class I [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IAU - iShares Gold Trust [EF]	JT	04/28/2020	P	\$15,001 - \$50,000	
Northwestern Mutual - Joint ⇒ ICAFX - American Funds Investment Company of America Class F-2 [MF]	JT	03/26/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IEF - iShares 7-10 Year Treasury Bond [EF]	JT	03/27/2020	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ IEF - iShares 7-10 Year Treasury Bond [EF]	JT	04/27/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ IEFA - iShares Core MSCI EAFE ETF [EF]	JT	03/27/2020	P	\$100,001 - \$250,000	
Northwestern Mutual - Joint ⇒ IEMG - iShares Core MSCI Emerging Markets [EF]	JT	03/27/2020	P	\$50,001 - \$100,000	
Northwestern Mutual - Joint ⇒ IJR - iShares Core S&P Small-Cap [EF]	JT	03/27/2020	P	\$50,001 - \$100,000	
Northwestern Mutual - Joint ⇒ IVV - iShares Core S&P 500 [EF]	JT	03/27/2020	P	\$50,001 - \$100,000	
Northwestern Mutual - Joint ⇒ LDLFX - Lord Abbett Short Duration Income Fund Class F [MF]	JT	03/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ LFRFX - Lord Abbett Floating Rate Fund Class F [MF]	JT	03/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ LSWWX - Loomis Sayles Global Allocation Fund Class Y [MF]	JT	03/26/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ MALOX - BlackRock Global Allocation Fund, Inc. Institutional Shares [MF]	JT	03/26/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ MAPTX - Matthews Pacific Tiger Fund Investor Class [MF]	JT	03/26/2020	P	\$50,001 - \$100,000	
Northwestern Mutual - Joint ⇒ OAKGX - Oakmark Global Fund Investor Class [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ ODVYX - Invesco Developing Markets Fund Class Y [MF]	JT	03/26/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ OGIYX - Invesco Global Opportunities Fund Class Y [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ OIGYX - Invesco Oppenheimer International Growth Fund Class Y [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ OSMYX - Invesco International Small-Mid Company Fund Class Y [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PCLPX - PIMCO Commodities PLUS Strategy Fund I-2 [MF]	JT	03/26/2020	P	\$15,001 - \$50,000	
Northwestern Mutual - Joint ⇒ PFPMX - Parnassus Mid Cap Fund Institutional Shares [MF]	JT	08/12/2020	P	\$15,001 - \$50,000	
Northwestern Mutual - Joint ⇒ PIFZX - PGIM Short-Term Corporate Bond Fund- Class Z [MF]	JT	03/26/2020	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒	JT	03/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
PONAX - PIMCO Income Fund Class A [MF]					
Northwestern Mutual - Joint ⇒ PONPX - PIMCO Income Fund Class I-2 [MF]	JT	03/26/2020	P	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PRIDX - T. Rowe Price International Discovery Fund [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ PRNEX - T. Rowe Price New Era Fund [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SKIRX - DWS Enhanced Commodity Strategy Fund [MF]	JT	04/27/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SKIRX - DWS Enhanced Commodity Strategy Inst [MF]	JT	03/26/2020	P	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SLYG - SPDR S&P 600 Small Cap Growth [EF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ SMCFX - American Funds SMALLCAP World Fund Class F-2 [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ TGIMX - TCW Total Return Bond Fund Class N [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ TIP - iShares TIPS Bond [EF]	JT	04/27/2020	P	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VAIPX - Vanguard Inflation-Protected Securities Fund [MF]	JT	03/26/2020	P	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VAIPX - Vanguard Inflation-Protected Securities Fund Admiral Shares [EF]	JT	04/24/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VAW - Vanguard Materials Index Fund [EF]	JT	03/27/2020	P	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VNQ - Vanguard Real Estate Index Fund [EF]	JT	03/27/2020	P	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual - Joint ⇒ VO - Vanguard Mid-Cap Index Fund ETF [EF]	JT	03/27/2020	P	\$100,001 - \$250,000	
Northwestern Mutual - Joint ⇒ VO - Vanguard Mid-Cap Index Fund ETF [EF]	JT	08/13/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - Joint ⇒ VPU - Vanguard Utilities Index Fund [EF]	JT	03/27/2020	P	\$1,001 - \$15,000	
Northwestern Mutual - Joint ⇒ WMFFX - American Funds Washington Mutual Investors Fund Class F-2 [MF]	JT	03/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ IEFA - iShares Core MSCI EAFE ETF [EF]	SP	05/1/2020	P	\$1,001 - \$15,000	
Northwestern Mutual - SC ⇒ IEMG - iShares Core MSCI Emerging Markets ETF [EF]	SP	04/30/2020	P	\$1,001 - \$15,000	
Northwestern Mutual - SC ⇒ IJH - iShares Core S&P Mid-Cap ETF [EF]	SP	05/14/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ PFPMX - Parnassus Mid Cap Fund Institutional Shares [MF]	SP	05/13/2020	P	\$1,001 - \$15,000	
Northwestern Mutual - SC ⇒ VEA - Vanguard Developed Markets Index Fund [MF]	SP	04/30/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Northwestern Mutual - SC ⇒ VO - Vanguard Mid-Cap Index Fund ETF [EF]	SP	05/14/2020	P	\$1,001 - \$15,000	
Northwestern Mutual - SC ⇒ VWO - Vanguard Emerging Markets Stock Index Fund [MF]	SP	05/1/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
NVIDIA Corporation (NVDA) [ST]		03/27/2020	P	\$1,001 - \$15,000	
ONSLOW CNTY N C LTD OBLIG LTD OBLIG BDS 2016 4.000% 10/01/35 [CS]		06/23/2020	P	\$1,001 - \$15,000	
DESCRIPTION: Onslow County, NC					
PEARLAND TEX WTRWKS & SWR SYS REV REV AND REF BDS 2017 C 5.000% 09/01/23 B/E DTD 08/01/17 N/C [CS]		04/7/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: PEARLAND, TEXAS					
Pepsico, Inc. (PEP) [ST]		03/27/2020	P	\$1,001 - \$15,000	
PRINCE GEORGES CNTY MD GO CONS PUB IMPT BDS 2014A 4.000% 09/01/32 B/E DTD 09/30/14 CLB CLB 09/01/24 @100.000 [CS]		04/2/2020	P	\$1,001 - \$15,000	
DESCRIPTION: PRINCE GEORGES COUNTY, MD					
Procter & Gamble Company (PG) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Progressive Corporation (PGR) [ST]		03/27/2020	P	\$1,001 - \$15,000	
S&P Global Inc. (SPGI) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Salesforce.com Inc (CRM) [ST]		03/27/2020	P	\$1,001 - \$15,000	
SANGAMON LOGAN & MENARD CNTYS ILL CMNTY UNIT SCH DIST NO 015 GO BDS 2020A 4.000% 12/01/34 [CS]		06/5/2020	P	\$1,001 - \$15,000	
DESCRIPTION: SANGAMON, LOGAN, & MENARD COUNTY, IL					
SANTA CRUZ CNTY ARIZ UNI SCH DIST NO 35 IMPT BDS PROJ OF 2019 2020 A 5.000% 07/01/22 B/E DTD [CS]		04/17/2020	P	\$1,001 - \$15,000	
DESCRIPTION: SANTA CRUZ COUNTY, AZ					
SARATOGA SPRINGS UTAH WTR REV REF BDS 2014 3.000% 12/01/24 B/E DTD [CS]		04/20/2020	P	\$1,001 - \$15,000	
DESCRIPTION: SARATOGA SPRINGS, UT					
SKAGIT CNTY WASH CONS SCH DIST NO 320 MOUNT VERNON UNLTD TAX GO BDS 2017 4.000% 12/01/32 [CS]		06/3/2020	P	\$1,001 - \$15,000	
DESCRIPTION: SKAGIT COUNTY, WASHINGTON					
Starbucks Corporation (SBUX) [ST]		03/27/2020	P	\$1,001 - \$15,000	
SULLIVAN CNTY PA SCH DIST GO NTS 2020 3.000% 04/01/28 B/E DTD 07/07/20 [CS]		06/5/2020	P	\$1,001 - \$15,000	
DESCRIPTION: SULLIVAN COUNTY PA					
Sundance Debt Partners, LLC [OL]		01/1/2020	P	\$100,001 - \$250,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LOCATION: Salt Lake City, UT, US DESCRIPTION: Real estate firm					
Sysco Corporation (SYY) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Texas Instruments Incorporated (TXN) [ST]		03/27/2020	P	\$1,001 - \$15,000	
TEXAS WATER DEV BRD ST REVOLVING FD REV BDS 2020 4.000% 08/01/34 [CS] DESCRIPTION: Texas Water Development		06/15/2020	P	\$1,001 - \$15,000	
Thermo Fisher Scientific Inc (TMO) [ST]		03/27/2020	P	\$1,001 - \$15,000	
TULSA CNTY OKLA INDPT SCH DIST NO 001 TULSA COMBINED PURP BDS 2016 B 2.000% 08/01/21 B/E DTD 08/01/16 N/C [CS] DESCRIPTION: TULSA COUNTY, OKLAHOMA		04/9/2020	P	\$1,001 - \$15,000	
Union Pacific Corporation (UNP) [ST]		03/27/2020	P	\$1,001 - \$15,000	
UnitedHealth Group Incorporated Common Stock (UNH) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Visa Inc. (V) [ST]		03/27/2020	P	\$1,001 - \$15,000	
WASHINGTON ST UNIV REV GEN REV AND REF BDS 2013 5.000% 10/01/22 B/E DTD 04/02/13 N/C [CS] DESCRIPTION: WASHINGTON STATE		04/7/2020	P	\$1,001 - \$15,000	
Waste Management, Inc. (WM) [ST]		03/27/2020	P	\$1,001 - \$15,000	
WAUKESHA WIS NT ANTIC NTS 2020C 3.00% 07/01/21 B/E DTD [CS] DESCRIPTION: WAUKESHA, WI		04/22/2020	P	\$1,001 - \$15,000	
Zoetis Inc. Class A (ZTS) [ST]		03/27/2020	P	\$1,001 - \$15,000	
Zoom Video Communications, Inc. - Class A (ZM) [ST]		03/4/2020	P	\$1,001 - \$15,000	

* 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
US House of Representatives	Salary	\$154,231.00
Glad Tidings, LLC	Spouse Salary	\$16,405.00

SCHEDULE D: LIABILITIES

Owner Creditor	Date Incurred	Type	Amount of Liability
Zions First National Bank	January 2010	Line of credit	\$50,001 - \$100,000
Chase Bank	November 2016	Mortgage	\$500,001 - \$1,000,000
Branch Banking & Trust Co.	November 2017	Mortgage	\$250,001 - \$500,000
Bank of Utah	June 2018	Mortgage	\$1,000,001 - \$5,000,000
Zions First National Bank	June 2018	Home Equity Loan	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Manager	Curtis Family Georgetown Condo, LLC
Manager	Curtis Family Brighton, LLC
Manager	John Ream Curtis 800 S. Center SPE, LLC
Manager	Action Commercial Park, LLC
Trustee	UT Valley Healthcare Foundation
Member	Monticello Development Company, Inc
Limited partner	Peak Ventures Fund II, L.P.
Limited partner	Monticello Development Company, LLC
Limited partner	QQUV Investments
Trustee	Curtis Family Trust
Board Member	Noorda College of Osteopathic Medicine

Position	Name of Organization
Board of Advisors	America's Freedom Festival

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Ameritrade
LOCATION: US
- Curtis Family Trust
- Northwestern Mutual
- Northwestern Mutual - Joint (Owner: JT)
- Northwestern Mutual - SC (Owner: SP)

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. John Curtis , 08/13/2021