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Annual Report for Calendar 2024

The Honorable Amy J Klobuchar (Klobuchar, Amy)

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 Print Report

The following statements were checked before filing:

- I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.
- I *omitted* assets because they meet the three-part test for exemption.

Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **No**

Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Spouse	Salary	State of Maryland (University of Baltimore) Annapolis, MD	> \$1,000	n/a
2	Spouse	Salary	Georgetown University Washington, DC	> \$1,000	n/a
3	Self	Royalties	Penguin Random House, LLC (c/o Bertelsmann Global Business Services) Westminster, MD	\$982.69	n/a
4	Spouse	Salary	University of Trento Trento, Italy	> \$1,000	n/a

Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	QCBMIX - CREF Core Bond Account - R3	Retirement Plans Deferred Compensation	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
2	TCLFX - TIAA-CREF Lifecycle 2025 Retirement	Retirement Plans Deferred Compensation	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
3	United States Senate Federal Credit Union (Washington, DC) <i>Type:</i> Certificate of Deposit, Checking, IRA Cash Accounts, Savings,	Bank Deposit	Joint	\$1,001 - \$15,000	Dividends, Interest,	\$201 - \$1,000
4	Wells Fargo (Minneapolis, MN) <i>Type:</i> Checking,	Bank Deposit	Spouse	\$1,001 - \$15,000	Interest,	None (or less than \$201)
5	TruStone Financial (Minneapolis, MN) <i>Type:</i> Certificate of Deposit, Checking, IRA Cash Accounts, Money Market Account, Savings,	Bank Deposit	Joint	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
6	Fidelity Investments IRA	Retirement Plans IRA	Spouse			
6.1	FBAQX - Fidelity Advisor Balanced Fund - Class	Mutual Funds	Spouse	\$100,001	Excepted	None (or

M	Mutual Fund	-	Investment	less than	
Asset	Asset Type	Owner	Income Fund, Type	\$201) Income	
			Value		
6.2	FAGOX - Fidelity Advisor Growth Opportunities Fund Class M	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Exceeded Investment Fund, None (or less than \$201)
6.3	FAERX - Fidelity Advisor Overseas Fund Class M	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Exceeded Investment Fund, None (or less than \$201)
6.4	FEIRX - Fidelity Advisor Equity Income Fund Class M	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Exceeded Investment Fund, None (or less than \$201)
6.5	FAEGX - Fidelity Advisor Equity Growth Fund Class M	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Exceeded Investment Fund, None (or less than \$201)
6.6	FTBRX - Fidelity Advisor Limited Term Bond Fund Class M	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Exceeded Investment Fund, None (or less than \$201)
7	State Street Russell Small Cap Index Non-Lending Series Fund Class K <i>Filer comment: (S) 401(k) plan</i>	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Exceeded Investment Fund, None (or less than \$201)
8	State Street Russell Small Cap Index Non-Lending Series Fund Class K <i>Filer comment: (S) 457(b) plan</i>	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Exceeded Investment Fund, None (or less than \$201)
9	SIUSX - Guggenheim Investment Grade Bond Fund Class A	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Exceeded Investment Fund, None (or less than \$201)
10	State Street S&P 500 Index Non-Lending Series Fund Class K	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Exceeded Investment Fund, None (or less than \$201)
11	State Street S&P MidCap Index Non-Lending Series Fund Class M	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Exceeded Investment Fund, None (or less than \$201)
12	PRILX - Parnassus Core Equity Fund-Institutional Shares	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Exceeded Investment Fund, None (or less than \$201)
13	TRSSX - T.Rowe Price Institutional Small-Cap Stock Fund	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Exceeded Investment Fund, None (or less than \$201)
14	TRMCX - T. Rowe Price Mid-Cap Value Fund Inc.	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Exceeded Investment Fund, None (or less than \$201)
15	Wilmington Trust - Large Cap Value II	Mutual Funds	Spouse	\$1,001 -	Exceeded

15	Wilmington Trust - Large Cap Value II <i>Filer comment: The Putnam Advisory Company, LLC advises Wilmington Trust funds.</i>	Mutual Funds Mutual Fund Asset Type	Spouse Owner	\$1,001 - \$15,000 Value	Excepted Investment Fund,	None (or less than \$201)
16	FPURX - Fidelity Puritan Fund	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
17	Wilmington Trust/Great Gray Trust T. Rowe Price Retirement 2035	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
18	Wilmington Trust/Great Gray Trust T. Rowe Price Retirement 2040	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
19	State Street U.S. Bond Index Non-Lending Series M	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
20	TCW Core Fixed Income Fund	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
21	Wilmington Trust/Great Gray Trust T. Rowe Price Retirement 2050	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
22	Schwab One Account	Brokerage/Managed Account	Spouse			
22.1	SNSXX - Schwab US Treasury Money	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Interest,	None (or less than \$201)

Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
1	Spouse	FAIGX	Fidelity Advisor Balanced Fund - Class M	Sale (Full)	10/25/2024	\$100,001 - \$250,000	n/a
2	Spouse	FBAQX	Fidelity Advisor Balanced Fund	Purchase	10/25/2024	\$100,001	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
3	Spouse	--	Select Bond (MSA/Allspring Global Investments)	Sale (Full)	10/28/2024	\$15,001 - \$50,000	Surrender of Northwestern Mutual life insurance policies
4	Spouse	--	International Equity (MSA/Dodge and Cox)	Sale (Full)	10/28/2024	\$1,001 - \$15,000	Surrender of Northwestern Mutual life insurance policies
5	Spouse	--	Index 500 Stock (MSA/Blackrock Advisors LLC)	Sale (Full)	10/28/2024	\$15,001 - \$50,000	Surrender of Northwestern Mutual life insurance policies
6	Spouse	--	Mid Cap Growth Stock (MSA/Wellington Management)	Sale (Full)	10/28/2024	\$1,001 - \$15,000	Surrender of Northwestern Mutual life insurance policies
7	Spouse	--	High Yield Bond (MSA/Federated Invest. Mgmt. Co.)	Sale (Full)	10/28/2024	\$1,001 - \$15,000	Surrender of Northwestern Mutual life insurance policies
8	Spouse	--	Small Cap Growth Stock (MSA/Wellington Management)	Sale (Full)	10/28/2024	\$1,001 - \$15,000	Surrender of Northwestern Mutual life insurance policies
9	Spouse	--	U.S. Strategic Equity Fund (Russell Investments)	Sale (Full)	10/28/2024	\$1,001 - \$15,000	Surrender of Northwestern Mutual life insurance policies
10	Spouse	--	International Developed Markets Fund (Russell Investments)	Sale (Full)	10/28/2024	\$1,001 - \$15,000	Surrender of Northwestern Mutual life insurance policies
11	Spouse	--	Small Cap Value (MSA/T Rowe Price)	Sale (Full)	10/28/2024	\$1,001 - \$15,000	Surrender of Northwestern Mutual life insurance policies
12	Spouse	--	Mid Cap Value (MSA/American Century)	Sale (Full)	10/28/2024	\$1,001 - \$15,000	Surrender of Northwestern Mutual life insurance policies

Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

Part 6. Travel

Did you, your spouse, or dependent child receive any reportable travel? **No**

Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2021	Spouse	Mortgage	0	2.375% (15 years)	\$250,001 - \$500,000	TruStone Financial Credit Union Minneapolis, MN	n/a
2	2021	Spouse	Other (Life Insurance Policy Loan)	-	5% (5 years)	\$10,001 - \$15,000	Northwestern Mutual Milwaukee, WI	Loan from variable life insurance policy
3	2022	Spouse	Other (Life Insurance Policy Loan)	-	5% (4 years)	\$10,001 - \$15,000	Northwestern Mutual Milwaukee, WI	Loan from variable life insurance policy
4	2023	Spouse	Other (Life Insurance Policy Loan (Dec. 12, 2023))	-	5% (5 years)	\$15,001 - \$50,000	Northwestern Mutual Milwaukee, WI	Loan from variable life insurance policy
5	2023	Spouse	Other (Life Insurance Policy Loan (Nov. 7, 2023))	-	5% (5 years)	\$15,001 - \$50,000	Northwestern Mutual Milwaukee, WI	Loan from variable life insurance policy
6	2023	Spouse	Other (Loan (Maryland Supplemental Retirement Plan - 401(k)))	-	9.25% (4 years)	\$15,001 - \$50,000	Nationwide / Maryland Supplemental Retirement Plan - 401(k) Plan Columbus, OH	n/a
7	2023	Spouse	Other (Loan (Life Insurance	-	5% (5 years)	\$10,001 - \$15,000	Northwestern Mutual Milwaukee	Loan from variable life insurance policy

#	Incurred	Debtor	Insurance Policy loan - (Type 16, 2023))	Points	Rate (Term) (years)	Amount	Milwaukee, WI Creditor	Comments
8	2024	Spouse	Other (Life Insurance Policy Loan - Aug. 14, 2024)	-	5% (5 years)	\$15,001 - \$50,000	Northwestern Mutual Life Insurance Co. Milwaukee, WI	n/a
9	2024	Spouse	Other (Life Insurance Policy Loan - Sept. 23, 2024)	-	5% (5 years)	\$15,001 - \$50,000	Northwestern Mutual Life Insurance Co. Milwaukee, WI	n/a
10	2024	Spouse	Other (Life Insurance Policy Loan - June 27, 2024)	-	5% (5 years)	\$15,001 - \$50,000	Northwestern Mutual Life Insurance Co. Milwaukee, WI	n/a
11	2024	Spouse	Other (Life Insurance Policy Loan - July 22, 2024)	-	5% (5 years)	\$15,001 - \$50,000	Northwestern Mutual Life Insurance Co. Milwaukee, WI	n/a
12	2024	Spouse	Other (Life Insurance Policy Loan - Sept. 3, 2024)	-	5% (5 years)	\$15,001 - \$50,000	Northwestern Mutual Life Insurance Co. Milwaukee, WI	n/a
13	2024	Spouse	Other (Life Insurance Policy Loan - April 22, 2024)	-	5% (5 years)	\$10,001 - \$15,000	Northwestern Mutual Life Insurance Co. Milwaukee, WI	n/a
14	2024	Joint	Mortgage	0.828	6.375% (15 years)	\$500,001 - \$1,000,000	New American Funding, LLC Austin, TX	n/a

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **No**

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Apr 1986	Waveland Press, Inc. Long Grove, IL	Royalty Agreement	Publishing agreement with Waveland Press, Inc. to receive book royalties consistent with usual and customary publishing terms. Waveland Press, Inc. periodically distributes royalties for the book "Uncovering the Dome," written by Amy Klobuchar. The royalty rate is 15% per copy for college and Amazon sales.	n/a
2	Feb 2015	Henry Holt and Company, LLC (Publisher) and N. S. Bienstock, Inc. (Author's Agent) New York, NY	Royalty Agreement	Publishing agreement with Henry Holt and Company, LLC (Henry Holt) to receive book royalties consistent with usual and customary publishing terms. In August 2015 Henry Holt published "The Senator Next Door: A Memoir from the Heartland" by Amy Klobuchar. The payment/book royalties were reported in the 2015 annual report. The University of Minnesota Press has acquired certain paperback rights to this book. The University of Minnesota Press issued a new edition of "The Senator Next Door" in 2019.	n/a
3	Feb 2018	The Knopf Doubleday Publishing Group (Publisher) (Author's Agent: United Talent Agency LLC/Paul Fedorko) New York, NY	Royalty Agreement	Publishing agreement with The Knopf Doubleday Publishing Group (Publisher), a division of Penguin Random House, LLC, to receive book royalties consistent with usual and customary publishing terms. Author's agent: United Talent Agency LLC, 888 Seventh Avenue, 7th Floor, New York, NY 10106/Paul Fedorko (The Paul Fedorko Agency, 85 East End Avenue, New York, NY 10028). The contract pertains to "Antitrust: Taking on Monopoly Power from the Gilded Age to the Digital Age."	A paperback of the "Antitrust" was published in 2022 by Vintage Books, an imprint of The Knopf Doubleday Publishing Group.
4	Feb 2022	St. Martin's Publishing Group	Royalty Agreement	Publishing agreement with St. Martin's Publishing Group to receive book royalties consistent with usual and customary publishing	The University of Minnesota Press has acquired the rights to publish a paperback version of "The Joy of Politics".

#	Date	New York, Parties Involved	Type	terms. Author's agent: Robert Barnett, Williams & Connolly LLP, 725 12th Street NW, Washington, DC 20005. The contract pertains to "The Joy of Politics: Surviving Cancer, a Campaign, a Pandemic, an Insurrection, and Life's Other Unexpected Curveballs."	Comments

Part 10. Compensation

Only required if you are a candidate or this is your first report Did any person or entity pay more than \$5,000 to you or for services provided by you? **This is not my first report.**

Attachments & Comments

Attachments

Document Title	Date/Time Added
2024 Report_Amy Klobuchar Supplement to Report (MD Optional Retirement Plan Contributions).pdf	04/26/2025 @ 4:55 PM
2024 Report Attachment_Amy Klobuchar Supplement to Report (Spouse 457(b) Plan Contributions).pdf	04/25/2025 @ 5:11 PM
2024 Report Attachment_Amy Klobuchar Supplement to Report (Spouse 401(k) Plan Contributions).pdf	04/25/2025 @ 5:11 PM
2024 Report_Amy Klobuchar Supplement to Report (Northwestern Mutual Variable Life Insurance Contributions).pdf	04/25/2025 @ 3:57 PM

No comments added.