Filing ID #10070403

Financial Disclosure Report

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Filer Information

Name: Hon. Greg Stanton
Status: Member
State/District: AZ04

Filing Information

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 07/17/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Desert Financial Credit Union [BA]		$15,001 - $50,000	Interest	$201 - $1,000	
Northwestern Mutual Life Insurance [WU]	SP	$15,001 - $50,000	None		
Northwestern Mutual Life Insurance [WU]	SP	$1,001 - $15,000	None		
State of Arizona Elected Officials Pension [PE] Description: Value of pension determined upon retirement		Undetermined	Tax-Deferred		
TRULIEVE CANNABIS CORP (TCNNF) [ST]	SP	$250,001 - $500,000	None		
Wells Fargo Accounts [BA]		$100,001 - $250,000	Interest	$1,001 - $2,500	
Capital Group American Funds ⇒ Capital Income Builder (CIRAX) [5P] Location: AZ	DC	$1,001 - $15,000	Tax-Deferred		
Capital Group American Funds ⇒ Capital Income Builder (CIRAX) [5P]	DC	$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Location: AZ					
Capital Group American Funds ⇒ Capital World Growth and Income Fund (CWIAX) [5P] Location: AZ	DC	$15,001 - $50,000	Tax-Deferred		☐
Capital Group American Funds ⇒ Capital World Growth and Income Fund (CWIAX) [5P] Location: AZ	DC	$15,001 - $50,000	Tax-Deferred		☐
Capital Group American Funds ⇒ The Growth Fund of America (CGFAX) [5P] Location: AZ	DC	$15,001 - $50,000	Tax-Deferred		☐
Capital Group American Funds ⇒ The Growth Fund of America - 529A (CGFAX) [5P] Location: AZ	DC	$15,001 - $50,000	Tax-Deferred		☐
Charles Schwab Rollover IRA ⇒ Charles Schwab Bank Sweep [BA]	SP	$1,001 - $15,000	None		☐
Charles Schwab Rollover IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Charles Schwab Rollover IRA ⇒ iShares Core Dividend Growth ETF (DGRO) [EF]	SP	None	Tax-Deferred		☑
Charles Schwab Rollover IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Charles Schwab Rollover IRA ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Charles Schwab Rollover IRA ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Charles Schwab Rollover IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Charles Schwab Rollover IRA ⇒ J.P. Morgan Exchange-Traded Fund Trust JPMorgan Active Growth ETF (JGRO) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Charles Schwab Rollover IRA ⇒ JPMorgan U.S. Value Factor ETF (JVAL) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Charles Schwab Rollover IRA ⇒ Putnam Focused Large Cap Value ETF (PVAL) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Charles Schwab Rollover IRA ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Charles Schwab Rollover IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Charles Schwab Rollover IRA ⇒ SPDR Series Trust SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Charles Schwab Rollover IRA ⇒ VanEck Morningstar Wide Moat ETF (MOAT) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Charles Schwab Rollover IRA ⇒ Vanguard Growth ETF (VUG) [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Charles Schwab Rollover IRA ⇒ Vanguard Value ETF (VTV) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Charles Schwab Roth IRA ⇒ Global X NASDAQ 100 Covered Call ETF (QYLD) [EF]	SP	None	Tax-Deferred		☑
Charles Schwab Roth IRA ⇒ Global X U.S. Preferred ETF (PFFD) [EF]	SP	None	Tax-Deferred		☑
Charles Schwab Roth IRA ⇒ iShares Broad USD High Yield Corporate Bond ETF (USHY) [EF]	SP	None	Tax-Deferred		☑
Charles Schwab Roth IRA ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Charles Schwab Roth IRA ⇒ Vanguard International High Dividend Yield ETF (VYMI) [EF]	SP	None	Tax-Deferred		☑
Charles Schwab Roth IRA ⇒ Vanguard Short-Term Bond ETF (BSV) [EF]	SP	None	Tax-Deferred		☑
Charles Schwab Roth IRA ⇒	SP	None	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]					
Charles Schwab Roth IRA ⇒ WisdomTree Emerging Markets High Dividend Fund (DEM) [EF]	SP	None	Tax-Deferred		✓
Charles Schwab Roth IRA ⇒ WisdomTree U.S. High Dividend Fund (DHS) [EF]	SP	None	Tax-Deferred		✓
Charles Schwab Roth IRA ⇒ WisdomTree U.S. High Yield Corporate Bond Fund (WFHY) [EF]	SP	None	Tax-Deferred		✓
Charles Schwab Roth IRA ⇒ WisdomTree Yield Enhanced U.S. Aggregate Bond Fund (AGGY) [EF]	SP	None	Tax-Deferred		✓
Equitable Edge 21 Select Variable Annuity ⇒ S&P 500 Std 1Yr - 40% Buff [OT] DESCRIPTION: Equitable buffer fund.		$50,001 - $100,000	Tax-Deferred		✓
Nationwide 401(a) Plan ⇒ American Funds 2035 Trgt Date Retire T6 RFFTX [MF]		$100,001 - $250,000	Tax-Deferred		
Nationwide 457(b) Plan ⇒ American Funds 2035 Trgt Date Retire T6 RFFTX [MF]		$50,001 - $100,000	Tax-Deferred		
Nationwide 457(b) Plan ⇒ City of Phoenix Stable Income Fund [MF]		$1,001 - $15,000	Tax-Deferred		
Nationwide Post Employment Health Plan ⇒ Nationwide Post Employment Health Plan [BA]		$1,001 - $15,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ Russell Growth Strategy Fund (RALAX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ Russell Growth Strategy Fund (RALCX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Vanguard 401(k) ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		

* 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 B: Transactions

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Charles Schwab Roth IRA ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	05/02/2024	P	$15,001 - $50,000	
Charles Schwab Roth IRA ⇒ WisdomTree Yield Enhanced U.S. Aggregate Bond Fund (AGGY) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Roth IRA ⇒ WisdomTree U.S. High Yield Corporate Bond Fund (WFHY) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Roth IRA ⇒ iShares Broad USD High Yield Corporate Bond ETF (USHY) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Roth IRA ⇒ Global X U.S. Preferred ETF (PFFD) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Roth IRA ⇒ WisdomTree U.S. High Dividend Fund (DHS) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Roth IRA ⇒ Global X NASDAQ 100 Covered Call ETF (QYLD) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Roth IRA ⇒ WisdomTree Emerging Markets High Dividend Fund (DEM) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Roth IRA ⇒ Vanguard Short-Term Bond ETF (BSV) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Roth IRA ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Roth IRA ⇒ Vanguard International High Dividend Yield ETF (VYMI) [EF]	SP	05/02/2024	S	$1,001 - $15,000	☐
Charles Schwab Rollover IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	10/08/2024	S (partial)	$1,001 - $15,000	☐
Charles Schwab Rollover IRA ⇒	SP	09/09/2024	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Schwab US Dividend Equity ETF (SCHD) [EF]					
Charles Schwab Rollover IRA ⇒ iShares Core Dividend Growth ETF (DGRO) [EF]	SP	08/29/2024	S	$50,001 - $100,000	☐
Charles Schwab Rollover IRA ⇒ Putnam Focused Large Cap Value ETF (PVAL) [EF]	SP	08/29/2024	P	$15,001 - $50,000	
Charles Schwab Rollover IRA ⇒ SPDR Series Trust SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	01/18/2024	P	$1,001 - $15,000	
Charles Schwab Rollover IRA ⇒ Vanguard Growth ETF (VUG) [EF]	SP	01/18/2024	P	$1,001 - $15,000	
Charles Schwab Rollover IRA ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]	SP	01/18/2024	P	$1,001 - $15,000	
Charles Schwab Rollover IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	01/18/2024	S (partial)	$1,001 - $15,000	☐
Charles Schwab Rollover IRA ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	SP	01/18/2024	S (partial)	$1,001 - $15,000	☐
Equitable Edge 21 Select Variable Annuity ⇒ S&P 500 Std 1Yr 40% Buff [OT] Location: US Description: Equitable buffer fund.		05/07/2024	P	$50,001 - $100,000	
Equitable Edge 21 Select Variable Annuity ⇒ S&P 500 Std 1Yr 40% Buff [OT] Location: US Description: Equitable buffer fund.		11/01/2024	S (partial)	$1,001 - $15,000	☐

* 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
Dorsey & Whitney LLP	Spouse Salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	SoFi	May 2017	Personal Loan	$10,000 - $15,000
JT	Bank of America	June 2013	Home Mortgage	$500,001 - $1,000,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
February 2000	Myself and the State of Arizona	Value determined upon retirement

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Aspen Institute, Inc.	08/10/2024	08/16/2024	Phoenix, AZ - Dublin, Ireland - Belfast, Ireland - Phoenix, AZ	0	☑	☑	☐

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- Nationwide 457(b) Plan
- Northwestern Mutual IRA (Owner: SP)
- Vanguard 401(k) (Owner: SP)
- Nationwide 401(a) Plan

- Nationwide Post Employment Health Plan
  Location: US
- Capital Group American Funds (Owner: DC)
  Location: AZ
- Charles Schwab Rollover IRA (Owner: SP)
  Description: Assets rolled over from Raymond James Rollover IRA to Charles Schwab Rollover IRA on September 1,2023 with no reportable transactions as a result of the rollover.
- Charles Schwab Roth IRA (Owner: SP)
  Description: Assets rolled over from Raymond James Rollover IRA to Charles Schwab Rollover IRA on September 1,2023 with no reportable transactions as a result of the rollover.
- Equitable Edge 21 Select Variable Annuity
  Location: US

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. Greg Stanton , 07/17/2025