Filing ID #10067296

Financial Disclosure Report

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Filer Information

Name: Hon. Haley Stevens
Status: Member
State/District: MI11

Filing Information

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 08/13/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Franklin Small -Mid Cap Growth Fund Advisor Class (FSGAX) [MF]		None	Capital Gains	$2,501 - $5,000	☑
Fundamental Investors, Class F-2 Shares (FINFX) [MF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	☑
JPMorgan Liquid Assets Money Market Fund Capital Shares (CJLXX) [MF]		None	Dividends, Interest	$201 - $1,000	☐
PNC Bank Checking Account [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
PNC Bank Savings Account [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
RJ Bank Deposit Program [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
Vanguard Div Appreciation ETF (VIG) [EF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Haley Stevens IRA ⇒ RJ Bank Deposit Program [BA]		$1 - $1,000	Tax-Deferred		☐
Haley Stevens IRA ⇒		$50,001 -	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Vanguard Div Appreciation ETF (VIG) [EF]		$100,000			
ROTH IRA ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]		$50,001 - $100,000	Tax-Deferred		☑
ROTH IRA ⇒ Fidelity Advisor New Insights Fund: Class I (FINSX) [MF]		$50,001 - $100,000	Tax-Deferred		☑
ROTH IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		$1,001 - $15,000	Tax-Deferred		☐
ROTH IRA ⇒ RJ Bank Deposit Program [BA]		$1 - $1,000	Tax-Deferred		☐
ROTH IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		$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?
Franklin Small -Mid Cap Growth Fund Advisor Class (FSGAX) [MF]		10/25/2024	S	$1,001 - $15,000	☑
ROTH IRA ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]		12/13/2024	P	$1,001 - $15,000	
ROTH IRA ⇒ Fidelity Advisor New Insights Fund: Class I (FINSX) [MF]		12/09/2024	P	$1,001 - $15,000	
Fundamental Investors, Class F-2 Shares (FINFX) [MF]		10/25/2024	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

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Rocket Mortgage	November 2021	Home Mortgage	$250,001 - $500,000
	Sofi	October 2023	Home Renovations	$15,001 - $50,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

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?**
Detroit Regional Chamber	05/28/2024	05/31/2024	Birmingham, Michigan - Mackinac Island, Michigan - Birmingham, Michigan	0	☑	☑	☐
Center Forward	06/16/2024	06/21/2024	Birmingham, Michigan - Lisbon, Portugal - Birmingham, Michigan	0	☑	☑	☑

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- ROTH IRA
- Haley Stevens IRA

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. Haley Stevens , 08/13/2025