



Filing ID #10066092

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Hillary Scholten  
**Status:** Member  
**State/District:** MI03

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 08/06/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Lake Michigan Credit Union [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Savings & Checking Account					
Lake Michigan Credit Union - DC #3 [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Savings & Certificate of Deposit					
Lake Michigan Credit Union DC #1 [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Savings & Certificate of Deposit					
Lake Michigan Credit Union DC #2 [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Savings & Certificate of Deposit					
Miller Johnson 401(k) ⇒ Fidelity Emerging Markets Index Fund (FPADX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Miller Johnson 401(k) ⇒ Schwab International Index Fund - Select Shares (SWISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Miller Johnson 401(k) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Miller Johnson 401(k) ⇒ Vanguard Mid-Cap Growth Index Fd Admiral (VMGMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase less than \$1,000					
Miller Johnson 401(k) ⇒ Vanguard Small-Cap Value Index Fd Admiral (VSIAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley 1 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 1 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 1 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 1 ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Purchase less than \$1,000					
Morgan Stanley 1 ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Purchase less than \$1,000					
Morgan Stanley 1 ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Purchase less than \$1,000					
Morgan Stanley 1 ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Purchase less than \$1,000					
Morgan Stanley 1 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley 1 ⇒ MFS Global Equity Fund Class C (MWECX) [MF]	DC	None	None		<input checked="" type="checkbox"/>
Morgan Stanley 1 ⇒ ProShares S&P 500 Dividend Aristocrats ETF (NOBL) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 2 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley 2 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 2 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 2 ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 2 ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 2 ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 2 ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 2 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley 2 ⇒ MFS Global Equity Fund Class C (MWECX) [MF]	DC	None	None		<input checked="" type="checkbox"/>
Morgan Stanley 2 ⇒ ProShares S&P 500 Dividend Aristocrats ETF (NOBL) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Russell Mid-cap Value ETF (IWS) [EF]					
Morgan Stanley 3 ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒ MFS Global Equity Fund Class C (MWECX) [MF]	DC	None	None		<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒ ProShares S&P 500 Dividend Aristocrats ETF (NOBL) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Mutual of America - Michigan Advocacy Program 403(b) Plan ⇒ Retirement 2035 Fund (MURJX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF ⇒ TIAA Traditional [FN]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF ⇒ Vanguard Intermediate-Term Bond Index Fund Admiral Shares (VBILX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF ⇒ Vanguard International Growth Fund Admiral Shares (VWILX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF ⇒ Vanguard Short-Term Inflation-Protected Securities Index Fd Admiral Cl (VTAPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>

\* 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?
Morgan Stanley 1 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	DC	04/18/2024	P	\$1,001 - \$15,000	
Morgan Stanley 1 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	04/18/2024	P	\$1,001 - \$15,000	
Morgan Stanley 1 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	DC	04/18/2024	P	\$1,001 - \$15,000	
Morgan Stanley 1 ⇒ ProShares S&P 500 Dividend Aristocrats ETF (NOBL) [EF]	DC	04/18/2024	P	\$1,001 - \$15,000	
Morgan Stanley 2 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 2 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 2 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 2 ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 2 ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 2 ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 2 ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 2 ⇒ ProShares S&P 500 Dividend Aristocrats ETF (NOBL) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 3 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley 3 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 3 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 3 ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 3 ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 3 ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 3 ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
Morgan Stanley 3 ⇒ ProShares S&P 500 Dividend Aristocrats ETF (NOBL) [EF]	DC	04/24/2024	P	\$1,001 - \$15,000	
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	01/16/2024	P	\$1,001 - \$15,000	
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	02/15/2024	P	\$1,001 - \$15,000	
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	03/15/2024	P	\$1,001 - \$15,000	
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	04/15/2024	P	\$1,001 - \$15,000	
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	05/15/2024	P	\$1,001 - \$15,000	
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	06/17/2024	P	\$1,001 - \$15,000	
TIAA-CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	09/16/2024	S	\$250,001 - \$500,000	<input type="checkbox"/>
TIAA-CREF ⇒	SP	09/16/2024	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA Traditional [FN]					
TIAA-CREF => Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	09/16/2024	P	\$50,001 - \$100,000	
TIAA-CREF => Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]	SP	09/16/2024	P	\$50,001 - \$100,000	
TIAA-CREF => Vanguard Intermediate-Term Bond Index Fund Admiral Shares (VBILX) [MF]	SP	09/16/2024	P	\$1,001 - \$15,000	
TIAA-CREF => Vanguard Short-Term Inflation-Protected Securities Index Fd Admiral Cl (VTAPX) [MF]	SP	09/16/2024	P	\$1,001 - \$15,000	
TIAA-CREF => Vanguard International Growth Fund Admiral Shares (VWILX) [MF]	SP	09/16/2024	P	\$50,001 - \$100,000	
TIAA-CREF => DFA Global Real Estate Securities Ptf (DFGEX) [MF]	SP	09/16/2024	P	\$15,001 - \$50,000	
TIAA-CREF => Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	07/15/2024	P	\$1,001 - \$15,000	
TIAA-CREF => Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	08/15/2024	P	\$1,001 - \$15,000	
TIAA-CREF => Vanguard International Growth Fund Admiral Shares (VWILX) [MF]	SP	12/18/2024	P	\$1,001 - \$15,000	
Morgan Stanley 1 => MFS Global Equity Fund Class A (MWEFX) [MF]	DC	04/18/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley 1 => MFS Global Equity Fund Class C (MWECX) [MF]	DC	04/18/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley 2 => MFS Global Equity Fund Class A (MWEFX) [MF]	DC	04/24/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley 2 => MFS Global Equity Fund Class C (MWECX) [MF]	DC	04/22/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley 3 ⇒ MFS Global Equity Fund Class A (MWEFX) [MF]	DC	04/24/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley 3 ⇒ MFS Global Equity Fund Class C (MWECX) [MF]	DC	04/22/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>

\* 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
Calvin University	Spouse Salary	N/A
Institute for Nonprofit News	Spouse's Consulting	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Old National Bank	2017	Home mortgage	\$50,001 - \$100,000
JT	Lake Michigan Credit Union	2019	Home equity loan	\$50,001 - \$100,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2022	Filer and Miller Johnson 401(k) Plan	Continued participation in a defined contribution plan that provides service retirement benefits.
June 2019	Filer and Michigan Advocacy Program 403(b) Plan	Continued participation in a defined contribution plan that provides service retirement benefits.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
United Nations Foundation	12/07/2024	12/09/2024	Grand Rapids, MI - New York, NY - Washington, DC	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Miller Johnson 401(k)
- Morgan Stanley 1 (Owner: DC)
- Morgan Stanley 2 (Owner: DC)
- Morgan Stanley 3 (Owner: DC)
- TIAA-CREF (Owner: SP)
- Mutual of America - Michigan Advocacy Program 403(b) Plan

## 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. Hillary Scholten , 08/06/2025