



Filing ID #10066533

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Mike Kennedy  
**Status:** Member  
**State/District:** UT03

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2024  
**Filing Date:** 08/12/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alta CDs [BA]		\$1,001 - \$15,000	Interest	None	\$2,501 - \$5,000
Alta Checking Account [BA]		\$50,001 - \$100,000	Interest	None	\$1 - \$200
Cash Account - Schwab [BA]		\$1,001 - \$15,000	Interest	None	\$1 - \$200
DTE Energy Company Common Stock (DTE) [ST]		None	Dividends	None	\$201 - \$1,000
Kennedy Capital, LLC [OL] LOCATION: UT, UT, US DESCRIPTION: Business Consultancy (dormant)		\$1 - \$1,000	None		
Kennedy for US Senate [DO]		\$250,001 - \$500,000	None		
Mike Kennedy for Utah [DO]		\$100,001 - \$250,000	None		
Referral Class Network [OL] LOCATION: New York, NY, US DESCRIPTION: Products & Services/Commercial Printing		\$1 - \$1,000	Business Income	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Voya Financial [WU]		None	Dividends	None	\$201 - \$1,000
Azova, Inc. ⇒ Azova, Inc. [PS]  DESCRIPTION: Stock Holding in Azova, Inc.	SP	\$50,001 - \$100,000	Dividends	None	None
Bank 1 ⇒ Savings [BA]		\$15,001 - \$50,000	Interest	None	\$1 - \$200
Bank 2 ⇒ Savings [BA]		\$1,001 - \$15,000	Interest	None	\$1 - \$200
Bank 3 ⇒ Savings [BA]		\$15,001 - \$50,000	Dividends	None	\$1 - \$200
Fidelity Investments ⇒ UUHC 401A ⇒ FID FRDM BLND 2035 [OT]  DESCRIPTION: University of Utah retirement plan		\$100,001 - \$250,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 403b ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 403b ⇒ Fidelity Diversified International Fund Class K (FDIKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 403b ⇒ Fidelity Freedom Blend 2035 Fund Class K6 (FHJDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 457B ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 457B ⇒ Fidelity Diversified International Fund Class K (FDIKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investments ⇒ UUHC 457B ⇒ Fidelity Freedom Blend 2035 Fund Class K6 (FHJDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Michael Kennedy, MD, Inc. ⇒ Premier Family Medical, LLC [OL]		\$100,001 - \$250,000	Business Income	None	\$100,001 - \$1,000,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: UT, UT, US					
DESCRIPTION: Ownership interest in medical practice sold to partners per March 2025 agreement.					
Schwab accounts ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$1,001 - \$15,000	Dividends, Interest	None	\$1 - \$200
Schwab accounts ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$1,001 - \$15,000	Dividends, Interest	None	\$1 - \$200
Schwab accounts ⇒ Cloudflare, Inc. Class A Common Stock (NET) [ST]		\$1,001 - \$15,000	None		
Schwab accounts ⇒ EA Series Trust Strive U.S. Energy ETF (DRLL) [EF]		\$1,001 - \$15,000	Dividends, Interest	None	\$1 - \$200
Schwab accounts ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Dividends, Interest	None	\$1 - \$200
Schwab accounts ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	None		
State Retirement ⇒ URS Retirement Plan-401(k) Target Date 2035, 100% Interest [OT]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Utah Retirement System 401(k) invested in Target Date 2035					

\* 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

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Executive Committee Member	Premier Family Medical

Position	Name of Organization
Officer	Michael Kennedy MD Inc
Officer	Kennedy Capital LLC
Limited Member	Referral Class Network LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2025	Premier Family Medical	Divestiture agreement for medical practice over 5-year term
June 2014	Mike Kennedy and University of Utah	Retirement Account from time employed at the University of Utah
January 2013	Mike Kennedy and Utah Retirement Systems	Retirement Account from Utah state for legislative service.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>Fidelity Investments</li><li>Schwab accounts</li><li>Bank 1 LOCATION: US</li><li>State Retirement</li><li>Azova, Inc. (Owner: SP) LOCATION: US</li><li>Bank 2 LOCATION: US</li><li>Bank 3 LOCATION: US</li><li>Michael Kennedy, MD, Inc. LOCATION: US</li><li>Fidelity Investments ⇒ UUHC 403b</li><li>Fidelity Investments ⇒ UUHC 401A</li><li>Fidelity Investments ⇒ UUHC 457B</li></ul>
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EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**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. Mike Kennedy , 08/12/2025