


United States Senate  
**Financial Disclosures**

**Annual Report for Calendar 2024**

The Honorable Michael S Lee (Lee, Mike)

 **Filed 08/12/2025 @ 8:11 PM**

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	Self	Royalties	Hachette Book Group Franklin, TN	\$34,375.00	n/a
2	Spouse	Self-Employment Income	Self Employed Provo, UT	> \$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	<b>Utah Community Credit Union</b> (Orem, UT) <i>Type:</i> Checking, Money Market Account, Savings	Bank Deposit	Joint	\$1,001 - \$15,000	None	None (or less than \$201)
2	<b>Rollover IRA Fidelity Management</b>	Retirement Plans IRA	Joint	--		
2.1	<b>FFTHX</b>	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends	None (or less than \$201)
3	<b>Utah Retirement System</b>	Retirement Plans 401(k), 403(b), or other Defined Contribution Plan.	Joint	--		
3.1	<b>Long Horizon Fund</b>	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Dividends	None (or less than \$201)
4	<b>Utah Community Credit Union</b> (Provo, UT) <i>Type:</i> Checking	Bank Deposit	Spouse	\$100,001 - \$250,000	None	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? **No**

## 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**

#	In-curred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2024	Joint	Mortgage	0.28%	6.625% (30 years)	\$500,001 - \$1,000,000	U.S. Bank Minneapolis, MN	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 In- volved	Type	Status and Terms	Comments
1	Feb 2011	Regnery Books / Eagle Publishing Washington, DC	Royalty Agreement	Book publishing agreement with Regnery Books / Eagle Publishing. Terms of agreement include royalties from sale of book published in July 2011.	n/a
2	Jan 2013	Simon & Schuster, Inc. New York, NY	Royalty Agreement	Book publishing agreement with Simon & Schuster, Inc, as entered into in January 2013 and modified in October 2013. Terms of agreement include royalties from sale of book published in June 2013.	n/a
3	Nov 2010	Howrey LLP Salt Lake City, UT	Continuation of payments by former employer	Pursuant to partnership and severance agreements, Howrey LLP to pay remaining partner salary due from 2010. (Note: no payments received to date).	n/a
4	Jul 2014	Sentinel Books /	Royalty Agreement	Book publishing	n/a

		Penguin Group USA, LLC New York, NY		agreement with Sentinel Books / Penguin Group USA, LLC. Terms of agreement include royalties from sale of book published in April 2015.	
5	Dec 2015	Sentinel Books / Penguin Group USA, LLC New York, NY	Royalty Agreement	Book publishing agreement with Sentinel Books / Penguin Group USA, LLC. Terms of agreement include royalties from sale of book published in April 2017.	n/a
6	Mar 2018	Sentinel Books / Penguin Group USA, LLC New York, NY	Royalty Agreement	Book publishing agreement with Sentinel Books / Penguin Group USA, LLC. Terms of agreement include royalties from sale of book published in April 2019.	n/a
7	Oct 2021	Hachette Book Group Franklin, TN	Royalty Agreement	Book publishing agreement with Hachette Book Group. Terms of agreement include	n/a

royalties  
from sale of  
book  
published in  
June 2022.

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8	Dec 2024	HarperCollins Publishers LLC New York, NY	Royalty Agreement	Book publishing agreement with HarperCollins Publishers LLC. Terms of agreement include royalties from sale of book to be published in June 2026	n/a
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### 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? **No**

### Attachments & Comments

*No attachments added.*  
*No comments added.*