



Filing ID #10057548

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Susie Lee
Status: Member
State/District: NV03

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/9/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ 3M Company Common Stock (MMM) [ST]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ AlerisLife Inc. - Common Shares (ALR) [ST]	DC	None	None		<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Apple Inc. - Common Stock (AAPL) [ST]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Aquila Opportunity Growth Fund Class A (ATGAX) [MF]	DC	\$50,001 - \$100,000	None		<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Avis Budget Group, Inc. - Common Stock (CAR) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Becton, Dickinson and Company Common Stock (BDX) [ST]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ BlackRock Global Alloc A (MDLOX) [MF]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Boeing Company (BA) [ST]	DC	\$15,001 - \$50,000	None		<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Cardinal Health, Inc. Common Stock (CAH) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Cash in Account [BA]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Conduent Incorporated (CNDT) [ST]	DC	\$1 - \$1,000	None		<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Diversified Healthcare Trust - Common Shares of Beneficial Interest (DHC) [ST]	DC	\$1 - \$1,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Dominion Energy, Inc. Common Stock (D) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Fidelity Nasdaq Composite Index ETF (ONEQ) [EF]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Fidelity Total Bond (FTBFX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Full House Resorts, Inc. - Common Stock (FLL) [ST]	DC	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ iShares Core MSCI Europe ETF (IEUR) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust	DC	\$250,001 -	Dividends	\$5,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brokerage Account ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]		\$500,000		\$15,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ iShares Dow Jones U.S. ETF (IYY) [EF]	DC	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ iShares MSCI Japan Index Fund (EWJ) [EF]	DC	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ MGM Resorts International Common Stock (MGM) [ST]	DC	\$100,001 - \$250,000	None		<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ PPL Corporation Common Stock (PPL) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Public Service Enterprise Group Incorporated Common Stock (PEG) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Sony Group Corporation American Depositary Shares (SONY) [ST]	DC	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ The RMR Group Inc. - Class A Common Stock (RMR) [ST]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Travel Leisure Co. Common Stock (TNL) [ST]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Wyndham Hotels & Resorts, Inc. Common Stock (WH) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Wynn Resorts, Limited - Common Stock (WYNN) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account ⇒ Xerox Holdings Corporation - Common Stock (XRX) [ST]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Columbia Income Opp 529 PRT AG FBO DC1 [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Columbia Income Opp 529 PRT AG FBO DC2 [MF]	DC	\$100,001 - \$250,000	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Residential Property on Youngdale Drive in Las Vegas, NV [RP] LOCATION: Las Vegas, Clark, NV, US	JT	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
DSL Living Trust ⇒ Residential Real Estate Promissory Note Receivable, 100% Interest [OT] DESCRIPTION: Amount of income represents principal plus interest payments made in 2023. Promissory Note addendum signed in 9/11/2023 that extends maturity date to 9/1/2025.	JT	\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
DSL Living Trust ⇒ Residential Rental Condo on Lodestone in Las Vegas, NV [RP] LOCATION: Las Vegas / Clark, NV, US	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
DSL Living Trust ⇒ Residential Rental Property on Edna Ave in Las Vegas, NV [RP] LOCATION: Las Vegas / Clark, NV, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
DSL Living Trust ⇒ Bank of America / US Trust Checking Account ⇒ Bank of America Checking [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Arthur J. Gallagher & Co. (AJG) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Cash in Account [BA]	JT	None	Interest	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Evoqua Water Technologies Corp. (AQUA) [ST]	JT	None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Gartner, Inc. (IT) [ST]	JT	None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ IQVIA Holdings, Inc. (IQV) [ST]	JT	None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Keysight Technologies Inc. (KEYS) [ST]	JT	None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ LPL Financial Holdings Inc. (LPLA) [ST]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Motorola Solutions, Inc. (MSI) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Nasdaq, Inc. (NDAQ) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ ON Semiconductor Corporation - Common Stock (ON) [ST]	JT	None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 740 ⇒ BNY Mellon Institutional S&P 500 Stock Index Fund Class I (DSPIX) [MF]	JT	None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 740 ⇒ Cash in Account [BA]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 740 ⇒ Full House Resorts, Inc. (FLL) [ST]	JT	\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
DSL Living Trust ⇒ Fidelity Investments Brokerage Account	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
⇒ Century Casinos, Inc. - Common Stock (CNTY) [ST]					<input type="checkbox"/>
DSL Living Trust ⇒ Fidelity Investments Brokerage Account ⇒ Fidelity Government Money Market (SPAXX) [BA]	JT	\$1 - \$1,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DSL Living Trust ⇒ Fidelity Investments Brokerage Account ⇒ Royal Caribbean Cruises Ltd. Common Stock (RCL) [ST]	JT	None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Investments DC1 UTMA Account ⇒ Boyd Gaming Corporation Common Stock (BYD) [ST]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Investments DC1 UTMA Account ⇒ Cash in Account [BA]	DC	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Investments DC1 UTMA Account ⇒ Fidelity Nasdaq Composite Index ETF (ONEQ) [EF]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments DC1 UTMA Account ⇒ Full House Resorts, Inc. - Common Stock (FLL) [ST]	DC	\$50,001 - \$100,000	None		<input type="checkbox"/>
Fidelity Investments DC1 UTMA Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Investments DC1 UTMA Account ⇒ iShares MSCI Japan Index Fund (EWJ) [EF]	DC	\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments DC1 UTMA Account ⇒ Methanex Corporation - Common Stock (MEOH) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Investments DC1 UTMA Account ⇒ MGM Resorts International Common Stock (MGM) [ST]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Investments DC1 UTMA Account ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]	DC	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments IRA ⇒ Fidelity Capital and Income Fund (FAGIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Investments IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Investments IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Diversified Emerging Mkts Fd (SBYEX) [OT]	DC	None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: BNY Mellon Investment Funds I liquidated fund on 5/12/2023.					
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Diversified International Fund Class Y (DDIFX) [MF]	DC	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Floating Rate Income Fund Class Y (DFLYX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Global Real Estate Sec Fd [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Global Real Return Fund [MF]	DC	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Capital losses only					
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Mid Cap Multi-Strategy Fund Class M Shares (MPMCX) [MF]	DC	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Municipal Opportunities Fund Class M Shares (MOTMX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon National Intermediate Municipal Bond Investor Shares (MINMX) [MF]	DC	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Select Managers Small Cap Growth Fund Class Y (DSGYX) [MF]	DC	\$15,001 - \$50,000	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon U.S. Equity Fund Class Y (DPUYX) [MF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ Cash in Account [BA]	DC	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ Fidelity Advisor International Small Cap Fund - Class Z (FIQIX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ Gateway Fund Class Y (GTEYX) [MF]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ Goldman Sachs Absolute Return Tracker Fund Class I (GJRTX) [MF]	DC	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	\$250,001 - \$500,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ iShares Short-Term National Muni Bond ETF (SUB) [EF]	DC	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ Nationwide BNY Mellon Dynamic U.S. Core Fund Eagle Class (NWAEX) [MF]	DC	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ SPDR S&P Dividend ETF (SDY) [EF]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ TCW Emerging Markets Income Fund I Cl (TGEIX) [MF]	DC	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ Van Eck CM Commodity Index Fd Cl Y (CMCYX) [MF] DESCRIPTION: Capital losses only	DC	None	None		<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	DC	\$100,001 - \$250,000	None		<input type="checkbox"/>
Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account ⇒ Apple Inc. - Common Stock (AAPL) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account ⇒ Cash in Account [BA]	DC	\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account ⇒ Century Casinos, Inc. - Common Stock (CNTY) [ST]	DC	\$15,001 - \$50,000	None		<input type="checkbox"/>
Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account ⇒ Full House Resorts, Inc. - Common Stock (FLL) [ST]	DC	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account ⇒ iShares MSCI Japan Index Fund (EWJ) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account ⇒ Myers Industries, Inc. Common Stock (MYE) [ST]	DC	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account ⇒ Nike, Inc. Common Stock (NKE) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Lee Children's Trust ⇒ Gabelli G Research Brokerage Account ⇒ Gabelli ABC Fund (GABCX) [MF]	DC	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Gabelli G Research Brokerage	DC	\$15,001 - \$50,000	Capital Gains,	\$2,501 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Account ⇒ Gabelli Asset Fund (GABAX) [MF]			Dividends	\$5,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Gabelli G Research Brokerage Account ⇒ Gabelli Global Rising Income and Dividend Fund Class AAA (GAGCX) [MF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Gabelli G Research Brokerage Account ⇒ Gabelli Small Cap Growth Fund (GABSX) [MF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Gabelli G Research Brokerage Account ⇒ Gabelli US Treasury Fund (INV) [MF]	DC	\$1 - \$1,000	None		<input type="checkbox"/>
Morgan Stanley Smith Barney Brokerage Account ⇒ Cash in Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Smith Barney Brokerage Account ⇒ ClearBridge Small Cap Fund Class A (LMSAX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Smith Barney Brokerage Account ⇒ ClearBridge Value Fund - Class A (LGVAX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Smith Barney Brokerage Account ⇒ Western Asset Intermediate-Term Municipals Fund Class A (SBLTX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Suzanne and Daniel R. Lee Family Foundation ⇒ Fidelity Investments Family Foundation Account ⇒ Fidelity Government Money Market (SPAXX) [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Suzanne and Daniel R. Lee Family Foundation ⇒ Fidelity Investments Family Foundation Account ⇒ Full House Resorts, Inc. - Common Stock (FLL) [ST]	JT	\$1,001 - \$15,000	None		<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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Columbia Income Opp 529 PRT AG FBO DC2 [5F] LOCATION: SC DESCRIPTION: Withdrawal for eligible education expenses.	DC	08/18/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Columbia Income Opp 529 PRT AG FBO DC2 [5F] LOCATION: SC DESCRIPTION: Withdrawal for eligible education expenses.	DC	12/14/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Arthur J. Gallagher & Co. (AJG) [ST]	JT	04/20/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Evoqua Water Technologies Corp. (AQUA) [ST]	JT	05/9/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Gartner, Inc. (IT) [ST]	JT	05/9/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ IQVIA Holdings, Inc. (IQV) [ST]	JT	04/20/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ IQVIA Holdings, Inc. (IQV) [ST]	JT	05/9/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Keysight Technologies Inc. (KEYS) [ST]	JT	05/9/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ LPL Financial Holdings Inc. (LPLA) [ST]	JT	04/20/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Motorola Solutions, Inc. (MSI) [ST]	JT	05/9/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ Nasdaq, Inc. (NDAQ) [ST]	JT	05/9/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DSL Living Trust ⇒ Bank of New York Brokerage Account 340 ⇒ ON Semiconductor Corporation (ON) [ST]	JT	05/9/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Bank of New York Brokerage Account 740 ⇒ BNY Mellon Institutional S&P 500 Stock Index Fund Class I (DSPIX) [MF]	JT	07/10/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DSL Living Trust ⇒ Fidelity Investments Brokerage Account ⇒ Royal Caribbean Cruises Ltd. (RCL) [ST]	JT	09/13/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Diversified Emerging Mkts Fd (SBYEX) [OT] LOCATION: US DESCRIPTION: Fund was liquidated by BNY Mellon Investment Funds I on 5/12/2023.	DC	05/12/2023	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Diversified International Fund Class Y (DDIFX) [MF]	DC	12/29/2023	P	\$15,001 - \$50,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Global Real Return Fund Class Y (DRRYX) [MF]	DC	11/29/2023	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Global Real Return Fund Class Y (DRRYX) [MF]	DC	11/29/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Mid Cap Multi-Strategy Fund Class M Shares (MPMCX) [MF]	DC	12/14/2023	P	\$15,001 - \$50,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Mid Cap Multi-Strategy Fund Class M Shares (MPMCX) [MF]	DC	12/26/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon Select Managers Small Cap Growth Fund Class Y (DSGYX) [MF]	DC	12/15/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon U.S. Equity Fund Class Y (DPUYX) [MF]	DC	03/29/2023	P	\$15,001 - \$50,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon U.S. Equity Fund Class Y (DPUYX) [MF]	DC	12/8/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon U.S. Equity Fund Class Y (DPUYX) [MF]	DC	12/8/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon U.S. Equity Fund Class Y (DPUYX) [MF]	DC	12/14/2023	P	\$100,001 - \$250,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon U.S. Equity Fund Class Y (DPUYX) [MF]	DC	12/21/2023	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ BNY Mellon U.S. Equity Fund Class Y (DPUYX) [MF]	DC	12/27/2023	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ Goldman Sachs Absolute Return Tracker Fund Class I (GJRTX) [MF]	DC	11/30/2023	P	\$50,001 - \$100,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	12/12/2023	P	\$15,001 - \$50,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	12/22/2023	P	\$100,001 - \$250,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	12/28/2023	P	\$100,001 - \$250,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	DC	05/24/2023	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ iShares Short-Term National Muni Bond ETF (SUB) [EF]	DC	05/9/2023	P	\$250,001 - \$500,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ Nationwide BNY Mellon Dynamic U.S. Core Fund Eagle Class (NWAEX) [MF]	DC	12/21/2023	P	\$1,001 - \$15,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ SPDR S&P Dividend ETF (SDY) [EF]	DC	01/3/2023	P	\$15,001 - \$50,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ SPDR S&P Dividend ETF (SDY) [EF]	DC	01/4/2023	P	\$100,001 - \$250,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ SPDR S&P Dividend ETF (SDY) [EF]	DC	08/22/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ TCW Emerging Markets Income Fund I Cl (TGEIX) [MF]	DC	05/8/2023	P	\$15,001 - \$50,000	
Lee Children's Trust ⇒ Bank of New York Brokerage Account ⇒ Van Eck CM Commodity Index Fd Cl Y (CMCYX) [MF]	DC	08/29/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Lee Children's Trust ⇒ Gabelli G Research Brokerage Account ⇒ Gabelli ABC Fund (GABCX) [MF] DESCRIPTION: Dividend reinvestment	DC	12/28/2023	P	\$1,001 - \$15,000	
Lee Children's Trust ⇒ Gabelli G Research Brokerage Account ⇒ Gabelli Asset Fund (GABAX) [MF] DESCRIPTION: Dividend reinvestment	DC	12/28/2023	P	\$1,001 - \$15,000	
Lee Children's Trust ⇒ Gabelli G Research Brokerage Account ⇒ Gabelli Small Cap Growth Fund (GABSX) [MF] DESCRIPTION: Dividend reinvestment	DC	10/18/2023	P	\$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
JT	American Express Credit Card	November through December 2023	Credit Card	\$50,001 - \$100,000
	BNY Mellon, N.A.	February 2021	30 Year Residential Mortgage	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Lee Family Foundation

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">◦ ARW Subtrust (Owner: DC)◦ ARW Subtrust ⇒ Fidelity Investments ARW Subtrust Brokerage Account (Owner: DC) LOCATION: Las Vegas, NV, US◦ DSL Living Trust (Owner: JT)◦ DSL Living Trust ⇒ Bank of America / US Trust Checking Account (100% Interest) (Owner: JT) LOCATION: Las Vegas, NV, US◦ DSL Living Trust ⇒ Bank of New York Brokerage Account 340 (Owner: JT) LOCATION: US◦ DSL Living Trust ⇒ Bank of New York Brokerage Account 740 (Owner: JT)
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LOCATION: US

- DSL Living Trust ⇒ Fidelity Investments Brokerage Account (Owner: JT)
LOCATION: US
- Fidelity Investments DC1 UTMA Account (Owner: DC)
LOCATION: US
- Fidelity Investments IRA
- Lee Children's Trust (Owner: DC)
- Lee Children's Trust ⇒ Bank of New York Brokerage Account (Owner: DC)
LOCATION: US
- Lee Children's Trust ⇒ Fidelity Investments Lee Children's Trust Brokerage Account (Owner: DC)
LOCATION: US
- Lee Children's Trust ⇒ Gabelli G Research Brokerage Account (Owner: DC)
LOCATION: US
- Morgan Stanley Smith Barney Brokerage Account
LOCATION: US
- Suzanne and Daniel R. Lee Family Foundation (Owner: JT)
LOCATION: Las Vegas, NV, US
DESCRIPTION: Nevada Nonprofit Corporation
- Suzanne and Daniel R. Lee Family Foundation ⇒ Fidelity Investments Family Foundation Account (Owner: JT)
LOCATION: Las Vegas, NV, 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. Susie Lee , 08/9/2024