



Filing ID #10055688

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Ted Lieu  
**Status:** Member  
**State/District:** CA36

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2017  
**Filing Date:** 08/15/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3148/Large Cap Growth Fund - A [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
3159 / Equity Index Fund - A [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Allianz NFJ Dividend Value Fund [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
American High-Income Trust-529A [5P]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: CA					
Apartment [RP]		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LOCATION: Baldwin Park, CA, US					
DESCRIPTION: Transfer of apartment from mother-in-law to spouse.					
Artisan International Growth Equity Fund [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Capital World Growth & Income [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Capital World Growth and Income-529A [5P]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: CA					
Eagle Large Cap Value Equity [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Hewitt Money Market [MF]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Invesco Stable Value Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Kinecta Account for Austin Lieu [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Kinecta Account for Brenna Lieu [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mondrian International Value [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Nationwide Core Plus Bond Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
PACE Global Fixed Income Fund [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
PIMCO All Asset Fund [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
PIMCO Diversified Income Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
PIMCO Investment Grade Corporate [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Pudential Core Plus Bond Fund [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Rothschild SMID CAP Value [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
SD Window [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SSGA Large Cap Growth [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
SSGA S&P 500 Index Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
The Growth Fund of America [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
The Growth Fund of America-529A [5P]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
LOCATION: CA					
The Income Fund of America-529A [5P]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: CA					
TimesSquare SMID CAP Growth [MF]		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	<input type="checkbox"/>
U.S. Government Securities Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
UBS International Sustainable Equity [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
UBS Target Retirement 2030 [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
US Bank Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard Target Retirement 2030 [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Target Retirement 2040 [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Washington Mutual Investors Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Account for Austin Lieu [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Account for Brennan Lieu [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo PMA Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE B: TRANSACTIONS

None disclosed.

## SCHEDULE C: EARNED INCOME

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo	March 2017	Loan for Condo in DC	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

Source	Description	Value
Greek Restaurant (Washington, DC, US)	Baklava	\$4.60

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

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

None disclosed.

## 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. Ted Lieu , 08/15/2023