



Filing ID #10056518

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Julie Lythcott-Haims  
**Status:** Congressional Candidate  
**State/District:** CA16

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 02/3/2024  
**Period Covered:** 01/01/2023– 01/5/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	None		
Amazon.com, Inc. (AMZN) [ST]	SP	\$1,001 - \$15,000	None		
Apple Inc. (AAPL) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	Not Applicable
Books: How to Raise an Adult; Real American; Your Turn: How to Be an Adult [IP]		Undetermined	Royalties	\$15,001 - \$50,000	\$15,001 - \$50,000
Costco Wholesale Corporation (COST) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	Not Applicable
Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
JP Morgan Chase & Co. (JPM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Love Over Time LLC [OL]		Undetermined	Earned income on Sch C	Not Applicable	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Palo Alto, CA, US					
DESCRIPTION: Workshops & writing/publishing					
Lythcott-Haims Family Trust ⇒ Dreyfus Govt Cash Mngmt Wealth [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	Not Applicable
Lythcott-Haims Family Trust ⇒ iShares MSCI Eurozone ETF (EZU) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Lythcott-Haims Family Trust ⇒ iShares Tr Core S&P Mid-Cap ETF (IJH) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Lythcott-Haims Family Trust ⇒ iShares Tr Core S&P Small-Cap ETF (IJR) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Lythcott-Haims Family Trust ⇒ iShares Tr MSCI USA Value Factor ETF (VLUE) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Lythcott-Haims Family Trust ⇒ iShares Tr Natl MUN BD ETF FD (MUB) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Lythcott-Haims Family Trust ⇒ SPDR S&P 500 ETF Tr Tr Unit (SPY) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Lythcott-Haims Family Trust ⇒ SPDR SER Tr Nuveen Bloomberg MUN BD ETF (TFI) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Lythcott-Haims Family Trust ⇒ SPDR SER Tr Nuveen Bloomberg Short Term MUN BD ETF (SHM) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Lythcott-Haims Family Trust ⇒ Van Eck Constant Maturity Commodity Index Fund Class Y (CMCYX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Lythcott-Haims Family Trust ⇒ Van Eck ETF Tr High Yield MUN Index ETF New (HYD) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Lythcott-Haims Family Trust ⇒ Vanguard Index FDS Real Estate Index FD ETF (VNQ) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Lythcott-Haims Family Trust ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard INTL Equity Index FDS FTSE Emerging MKTS ETF (VWO) [EF]					Applicable
Lythcott-Haims Family Trust ⇒ Vanguard INTL FD FTSE Developed MKTS ETF (VEA) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	Not Applicable
Lythcott-Haims Family Trust ⇒ 529 ⇒ American College Enrollment Fund Class A (CENAX) [MF]		\$15,001 - \$50,000	None		
Microsoft Corporation (MSFT) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Moderna, Inc. (MRNA) [ST]	SP	\$1,001 - \$15,000	None		
Northwestern Mutual IRA ⇒ Dreyfus Govt Cash Mngmt Wealth [BA]		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ iShares MSCI Eurozone ETF (EZU) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ iShares Tr Core S&P Mid-Cap ETF (IJH) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ iShares Tr Core S&P Small-Cap ETF (IJR) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ iShares Tr Core Total USA BD MKT ETF (IUSB) [EF]		\$250,001 - \$500,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ iShares Tr MSCI USA Value Factor ETF (VLUE) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ SPDR S&P 500 ETF Tr Tr Unit (SPY) [EF]		\$250,001 - \$500,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ Van Eck Constant Maturity Commodity Index Fund Class Y (CMCYX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ Vanguard BD Index FDS Vanguard Intermediate BD ETF (BIV) [EF]		\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Northwestern Mutual IRA ⇒ Vanguard Index FDS Real Estate Index FD ETF (VNQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ Vanguard INTL Equity Index FDS FTSE Emerging MKTS ETF (VWO) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ Vanguard INTL FD FTSE Developed MKTS ETF (VEA) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Northwestern Mutual IRA ⇒ Vanguard Life Strategy Growth Fund Investor Shares (VASGX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Novo Nordisk A/S (NVO) [ST]	SP	\$1,001 - \$15,000	None		
Residential Real Property located in Sea Ranch, California [RP]  LOCATION: Sea Ranch, CA, US		\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	None
Restaurant Brands International Inc. Common Shares (QSR) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Target Corporation (TGT) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Tesla, Inc. (TSLA) [ST]	SP	\$1,001 - \$15,000	None		
USAA Federal Savings Bank ⇒ USAA Savings Account [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	Not Applicable
Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	None		

\* Asset class 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 Current Year to Filing	Amount Preceding Year
Study.com; Cr8tr, Inc.	Spouse	N/A	N/A

Love Over Time LLC	Workshops, Consulting, Seminars	\$584,650.00	\$467,314.00
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### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Redwood Credit Union, Santa Rosa, California	January 2021	Mortgage on Rental Property, Sea Ranch, CA	\$1,000,001 - \$5,000,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
City Councilmember	Palo Alto City Council
Board Member	Black Women's Health Imperative
Board Member	Narrative Magazine
Board Member	Common Sense Media
Trustee	California College of the Arts
Advisory Board Member	LeanIn.org
Advisory Board Member	Sir Ken Robinson Foundation
Advisory Board Member	Baldwin for the Arts
Advisory Board Member	Foundation for a College Education
Trustee	Lythcott-Haims Family Living Trust
Owner / Member	Love Over Time LLC

### SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Glenbard Parent Series (Glen Ellyn, IL, US)	Book Talk
Phillips Academy (Andover, MA, US)	Book Talk
Blake School (Minneapolis, MN, US)	Book Talk
School Speaker Alliance of Los Angeles (SSALA) (Los Angeles, CA, US)	Book Talk

Source (Name and Address)	Brief Description of Duties
Genentech (San Francisco, CA, US)	Book Talk
Cambridge School of Weston (Weston, MA, US)	Book Talk
Hillel International (Washington, DC, US)	Book Talk
Potomac/Safe Community Coalition/Rodef Shalom (McLean, VA, US)	Book Talk
Agnes Irwin school (Philadelphia, PA, US)	Book Talk
Come As You Are Conference (Palo Alto, CA, US)	Book Talk
Greenhills School (Ann Arbor, MI, US)	Book Talk
2022 International Boys' Schools Coalition Annual Conference (Dallas, TX, US)	Book Talk
Roxbury Latin School (Boston, MA, US)	Book Talk
Battle Ground Academy (Nashville, TN, US)	Book Talk
Kent Denver School (Englewood, CO, US)	Book Talk
SUNY Binghamton (Binghamton, NY, US)	Book Talk
Crofton House (Vancouver BC, CA)	Book Talk
Oakwood School (North Hollywood, CA, US)	Book Talk
California Community College Student Leadership Conference (San Diego, CA, US)	Book Talk
Grace Church (New York, NY, US)	Book Talk
Independent Education Consultants Association (San Diego, CA, US)	Book Talk
Charlotte Country Day School (Charlotte, NC, US)	Book Talk
Inkwell Management (New York, NY, US)	Writing & Publishing
Meta (Menlo Park, CA, US)	Writing
TED Conferences LLC (New York, NY, US)	Teaching
Menlo Park School District (Menlo Park, CA, US)	Book Talk
St. Christopher's School / St. Catherine's (Richmond, VA, US)	Book Talk
Flossmore School District 161 (Chicago Heights, IL, US)	Book Talk
MacDonogh Parents Association (Baltimore, MD, US)	Book Talk

Source (Name and Address)	Brief Description of Duties
Laurence School (Valley Glen, CA, US)	Book Talk
Vanderbilt University (Nashville, TN, US)	Book Talk
Harker School (San Jose, CA, US)	Book Talk
Capital One (McLean, VA, US)	Book Talk
Oregon State Conference (Portland, OR, US)	Book Talk
Bronxville PTA (Bronxville, NY, US)	Book Talk
Rodef Shalon (San Rafael, CA, US)	Book Talk
Chaminade (West Hills, CA, US)	Book Talk
Sage Hill School (Newport Beach, CA, US)	Book Talk
Redwood Day School (Oakland, CA, US)	Book Talk
The Langley School (Langley, VA, US)	Book Talk
Independent Schools Association of the Central States (Chicago, IL, US)	Book Talk
Deerfield Parent Network (Deerfield, IL, US)	Book Talk
Substack (San Francisco, CA, US)	Book Talk
Lafayette School District (Lafayette, CA, US)	Book Talk
City of Palo Alto (Palo Alto, CA, US)	Public Service

SCHEDULE A ASSET CLASS DETAILS

- Lythcott-Haims Family Trust
- Lythcott-Haims Family Trust ⇒ 529  
LOCATION: VA
- Northwestern Mutual IRA
- USAA Federal Savings Bank  
LOCATION: San Antonio, TX, US

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:** Julie Lythcott-Haims , 02/3/2024