



Filing ID #10058837

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Stephen William Houlahan
Status: Congressional Candidate
State/District: CA48

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2024
Filing Date: 04/19/2024
Period Covered: 01/01/2023– 04/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America Checking Account [BA]		\$1,001 - \$15,000	None		
Calpers ⇒ Calpers [OT]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Calpers State Retirement Fund from serving in previous Elected Office.					
Capital Group America Funds ⇒ Stephen's College Fund [5P]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
LOCATION: IN					
Lincoln 403B ⇒ Lincoln 403B Tax Deferred Retirement Plan [OT]		\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
DESCRIPTION: Lincoln 403B Tax Deferred Retirement Plan					
Sharp Saver Retirement Plan ⇒ 401(k) Employer Sponsored Retirement Savings Plan [OT]		\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
DESCRIPTION: 401(k) Employer Sponsored Retirement Savings Plan					
WesCom Credit Union Account [BA]	SP	\$1,001 - \$15,000	None		

* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Sharp Health Care	Salary	\$160,601.00	\$144,829.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Mr. Cooper	October 2009	Mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
President	Save Mission Trails

SCHEDULE F: AGREEMENTS

None disclosed.

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">CalpersCapital Group America Funds LOCATION: INLincoln 403BSharp Saver Retirement Plan

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: Stephen William Houlahan , 04/19/2024