



Filing ID #10055341

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Nolan Chen
Status: Congressional Candidate
State/District: CA10

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 10/21/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401K ⇒ Vang Inst 500 Idx TR [MF] DESCRIPTION: Fidelity 401k		\$1,001 - \$15,000	Tax-Deferred		
401K ⇒ Vanguard Target 2035 [MF] DESCRIPTION: Fidelity 401k		\$15,001 - \$50,000	Tax-Deferred		
529 College Savings ⇒ Index U.S. Equity Portfolio [MF] DESCRIPTION: California ScholarShare 529 - DC1		\$15,001 - \$50,000	Tax-Deferred		
529 College Savings ⇒ Index U.S. Equity Portfolio [MF] DESCRIPTION: California ScholarShare529 - DC2		\$1,001 - \$15,000	Tax-Deferred		
Brokerage ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Brokerage ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brokerage ⇒ Boeing Company (BA) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Brokerage ⇒ DIREXION SHARES ETF TRUST [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage ⇒ Intel Corporation (INTC) [ST] DESCRIPTION: Fidelity Individual		\$1,001 - \$15,000	Tax-Deferred		
Brokerage ⇒ Intuitive Surgical, Inc. (ISRG) [ST] DESCRIPTION: schwab 9032		\$1,001 - \$15,000	Capital Gains	None	None
Brokerage ⇒ Marriott International - Class A (MAR) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Brokerage ⇒ McDonald's Corporation (MCD) [ST] DESCRIPTION: schwab -4206		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Brokerage ⇒ Microsoft Corporation (MSFT) [ST] DESCRIPTION: schwab 4206		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage ⇒ NXP Semiconductors N.V. (NXPI) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Brokerage ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Cash and Savings ⇒ eTrade Investment [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Cash and Savings ⇒ Fidelity Invididual [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Cash and Savings ⇒ Schwab Brokerage [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200

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Cash and Savings ⇒ Schwab Individual [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Cash and Savings ⇒ Schwab IRA [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Cash and Savings ⇒ State Department Federal Credit Union Checking [BA]		\$1 - \$1,000	None		
Cash and Savings ⇒ State Department Federal Credit Union Prime Money Management [BA]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Cash and Savings ⇒ Wells Fargo Brokerage [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Cash and Savings ⇒ Wells Fargo Custom Checking [BA]		\$1,001 - \$15,000	None		
Cash and Savings ⇒ Wells Fargo PMA Checking [BA]		\$1,001 - \$15,000	None		
Cash and Savings ⇒ Wells Fargo Savings [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
IRA ⇒ Align Technology, Inc. (ALGN) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Amazon.com, Inc. (AMZN) [ST] DESCRIPTION: schwab ira		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Boeing Company (BA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

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Costco Wholesale Corporation (COST) [ST]					
IRA ⇒ Domino's Pizza Inc (DPZ) [ST] DESCRIPTION: Schwab IRA		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Home Depot, Inc. (HD) [ST] DESCRIPTION: Schwab IRA		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Intel Corporation (INTC) [ST] DESCRIPTION: Schwab IRA		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Intuit Inc. (INTU) [ST] DESCRIPTION: Schwab IRA		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Marriott International - Class A (MAR) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ McDonald's Corporation (MCD) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ NVIDIA Corporation (NVDA) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Procter & Gamble Company (PG) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Salesforce, Inc. (CRM) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ SCHWAB S&P 500 INDEX [MF]		\$50,001 - \$100,000	Tax-Deferred		
IRA ⇒ Shake Shack, Inc. Class A (SHAK) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA ⇒ Snowflake Inc. Class A (SNOW) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Southwest Airlines Company (LUV) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Starbucks Corporation (SBUX) [ST] DESCRIPTION: schwab ira		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Target Corporation (TGT) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Tesla, Inc. (TSLA) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Toll Brothers, Inc. (TOL) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Walmart Inc. (WMT) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Waste Management, Inc. (WM) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Wells Fargo & Company (WFC) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Zoom Video Communications, Inc. - Class A (ZM) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Zscaler, Inc. (ZS) [ST] DESCRIPTION: schwab ira		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
McDonald's Corporation (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

* 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
Amazon Web Services Inc	employment	\$262,951.00	\$242,475.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Transportation Advisory Committee Chair	San Ramon
President	APAPA Tri Valley Chapter

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> ◦ 401K ◦ 529 College Savings LOCATION: CA ◦ Brokerage LOCATION: US ◦ Cash and Savings LOCATION: US ◦ IRA
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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: Nolan Chen , 10/21/2023