



Filing ID #10050853

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Lucille Roybal-Allard
Status: Former Member
State/District: CA40

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2023
Filing Date: 03/28/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
CA State Retirement [BA]		Undetermined	Pension	\$2,501 - \$5,000	<input type="checkbox"/>
Congressional Federal Credit Union [BA]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Congressional Federal Credit Union [BA]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Navy Federal Credit Union [BA]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Pentagon Federal Credit Union [BA]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Personal residence, Lake Arrowhead, CA. [RP]	JT	None	Capital Gains	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
LOCATION: San Bernardino, CA, US					
DESCRIPTION: Official sale of personal residence, Lake Arrowhead, CA March 2022.					

* 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?
Personal residence, Lake Arrowhead, CA [RP]	JT	03/1/2022	S	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
LOCATION: San Bernardino, CA, US					
DESCRIPTION: Official sale of personal residence, Lake Arrowhead, CA.					

* 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
California State Retirement	Legislative Pension	\$2,500.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	American Express	2020	Revolving Account	\$10,000 - \$15,000
JT	Pentagon FCU	2015	Mortgage on personal residence, Washington, DC	\$500,001 - \$1,000,000
JT	Wells Fargo	1998	Mortgage on personal residence, Los Angeles	\$250,001 - \$500,000
JT	Chase	November 2011	Mortgage on personal residence, Downey, CA	\$100,001 - \$250,000
JT	Citimortgage (Citibank)	March 2022	Mortgage on personal residence, Laguna, CA	\$1,000,001 - \$5,000,000
JT	Citimortgage (Citibank)	2015	Personal residence, Lake Arrowhead, CA sold.	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member Board of Regents	Smithsonian Institution

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
1992	Self & the State of California	Continued participation in California pension plan.

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.

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. Lucille Roybal-Allard , 03/28/2023