



Filing ID #10055083

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Allyson Muniz Damikolas
Status: Congressional Candidate
State/District: CA40

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 06/22/2023
Period Covered: 01/01/2022– 05/16/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allyson IRA ⇒ AB LARGE CAP GROWTH AD [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson IRA ⇒ AB SELECT US LONG/SHORT AD [MF]		None	Tax-Deferred		
Allyson IRA ⇒ BLACKROCK FDS BRK DISC INSTL [MF]		\$1 - \$1,000	Tax-Deferred		
Allyson IRA ⇒ BLACKROCK FDS INCM PTF INSTL [MF]		\$1 - \$1,000	Tax-Deferred		
Allyson IRA ⇒ BLACKROCK HIGH INCOME FUND INSTITUTIONAL CLASS [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson IRA ⇒ BLACKROCK STRATEGIC INCOME OPPORTUNITIES PORT FUND INSLT CLASS [MF]		\$1 - \$1,000	Tax-Deferred		
Allyson IRA ⇒ BLACKROCK TOTAL RETURN FUND CLASS		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
INSTITUTIONAL [MF]					
Allyson IRA ⇒ COLUMBIA OVERSEAS VALUE FUND-12 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson IRA ⇒ FIDELITY 500 INDEX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson IRA ⇒ FIDELITY ADV FOCUS EMERGING MKTS CLZ [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson IRA ⇒ FIDELITY ADV GROWTH OPPORT CLZ [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson IRA ⇒ FIDELITY ADV INVESTMENT GRD BOND CLZ [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson IRA ⇒ FIDELITY GOVERNMENT CASH RESERVES [MF]		\$1 - \$1,000	Tax-Deferred		
Allyson IRA ⇒ FIDELITY INFLATION PROTECT BOND INDEX [MF]		None	Tax-Deferred		
Allyson IRA ⇒ FIDELITY INTERNATIONAL INDEX [MF]		\$1 - \$1,000	Tax-Deferred		
Allyson IRA ⇒ FIDELITY MONEY MARKET FUND PREMIUM [MF]		None	Tax-Deferred		
Allyson IRA ⇒ FIRST EAGLE GLOBAL FUND CLASS I [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson IRA ⇒ GS GQG PARTNERS INTL OPPS INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson IRA ⇒ LAZARD GL LISTED INFRASTRUCTURE PRT IN [MF]		\$1 - \$1,000	Tax-Deferred		
Allyson IRA ⇒ MARKET NEUTRAL INCOME FUND CL I [MF]		\$1 - \$1,000	Tax-Deferred		
Allyson IRA ⇒ MID CAP GROWTH EQUITY-INST CLASS [MF]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allyson IRA ⇒ MS MULTI-STRATEGY ALTERNATIVES FUND CLASS I [MF]		\$1 - \$1,000	Tax-Deferred		
Allyson IRA ⇒ PARAMETRIC COMMODITY STRATEGY FUND INST [MF]		None	Tax-Deferred		
Allyson IRA ⇒ PGIM SHORT-TER CORP BOND CL Z [MF]		\$1 - \$1,000	Tax-Deferred		
Allyson IRA ⇒ THE HARTFORD EQUITY INCOME FUND-I [MF]		\$1,001 - \$15,000	Tax-Deferred		
Allyson Old 401K ⇒ AB LARGE CAP GROWTH AD [MF] DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022		None	Tax-Deferred		
Allyson Old 401K ⇒ BLACKROCK ADVANTAGE SMALL CAP CORE INSTL [MF] DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022		None	Tax-Deferred		
Allyson Old 401K ⇒ BLACKROCK HIGH EQUITY INCOME INSTL [MF] DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022		None	Tax-Deferred		
Allyson Old 401K ⇒ BLACKROCK MID CAP GROWTH EQUITY INSTL [MF] DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022		None	Tax-Deferred		
Allyson Old 401K ⇒ BLACKROCK MULTI-ASSET INCOME INSTL [MF] DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022		None	Tax-Deferred		
Allyson Old 401K ⇒ BLACKROCK STRATEGIC INCOME OPPORTUNITIES PORT FUND INSLT CLASS [MF] DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022		None	Tax-Deferred		
Allyson Old 401K ⇒ BLACKROCK TOTAL RETURN FUND CLASS INSTITUTIONAL [MF]		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ CLUMBIA OVERSEAS VALUE CL I2 [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ FIDELITY 500 INDEX [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ FIDELITY ADV FOCUS EMERGING MKTS CLZ [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ FIDELITY ADV GROWTH OPPORT CLZ [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ FIDELITY ADVISOR INV GRAD BOND CLZ [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ FIDELITY INTERNATL INDEX FUND [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ FIRST EAGLE GLOBAL CLASS I [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ FS MULTI-STRATEGY ALTERNATIVES FUND I [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ GOLDMAN SACHS GQG PARTNERS INTL OPP I [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ LAZARD GLOBAL LISTED INFRASTRUCTURE INSTL [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PGIM SHORT-TER CORP BOND CL Z [MF]					
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ THE HARTFORD EQUITY INCOME FUND-I [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Allyson Old 401K ⇒ VICTORY MARKET NEUTRAL INCOME FD I [MF]		None	Tax-Deferred		
DESCRIPTION: ROLLED OVER INTO ALLYSON IRA IN 2022					
Ardurra 401K ⇒ ALLSPRING SPECIAL MID CAP VALUE A [MF]		\$1 - \$1,000	Tax-Deferred		
Ardurra 401K ⇒ AMERICAN FUNDS EUROPACIFIC GROWTH R6 FUND [MF]		\$1 - \$1,000	Tax-Deferred		
Ardurra 401K [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ardurra 401K ⇒ BLACKROCK MID-CAP GROWTH EQUITY K FUND [MF]		\$1 - \$1,000	Tax-Deferred		
Ardurra 401K ⇒ INVESTOCO DEVELOPING MARKETS Y FUND [MF]		\$1 - \$1,000	Tax-Deferred		
Ardurra 401K ⇒ MFS VALUE R3 FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ardurra 401K ⇒ PRINCIPAL BLUE CHIP SEPARATE [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ardurra 401K ⇒ PRINCIPAL SMALLCAP S&P 600 INDEX [MF]		\$1 - \$1,000	Tax-Deferred		
Ardurra 401K ⇒ VANGUARD 500 INDEX ADMIRAL FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ardurra 401K ⇒ VANGUARD TOTAL BOND MARKET [MF]		\$1 - \$1,000	Tax-Deferred		
Ardurra 401K ⇒ VANGUARD TOTAL INTERNATIONAL STOCK		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
INDEX ADMIRAL FUND [MF]					
Ardurra 401K ⇒ WESTERN ASSET CORE PLUS BOND I [MF]		\$1 - \$1,000	Tax-Deferred		
BC ESOP [PS]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Brown and Caldwell Corporation employee stock ownership program					
BC Marc old 401K ⇒ American Century Small Cap Value R6 [MF]		None	Tax-Deferred		
DESCRIPTION: Closed in 2022					
BC Marc old 401K ⇒ American Funds Washington Mutual R6 [MF]		None	Tax-Deferred		
BC Marc old 401K ⇒ Calvert Bond I [MF]		None	Tax-Deferred		
DESCRIPTION: Closed in 2022					
BC Marc old 401K ⇒ Janus Henderson Enterprise N [MF]		None	Tax-Deferred		
DESCRIPTION: Closed					
BC Marc old 401K ⇒ JPMCB Equity Index Fund-CF [MF]		None	Tax-Deferred		
DESCRIPTION: Account Closed in 2022					
BC Marc old 401K ⇒ JPMCB Stable Asset Income F [MF]		None	Tax-Deferred		
DESCRIPTION: closed in 2022					
BC Marc old 401K ⇒ Nuveen Real Estate Securities [MF]		None	Tax-Deferred		
DESCRIPTION: Closed in 2022					
Brown and Caldwell stock [PS]		\$1,000,001 - \$5,000,000	Capital Gains	None	\$100,001 - \$1,000,000
DESCRIPTION: Brown and Caldwell private stock completely divested in 2022					
Joint - Balanced ⇒ AB INTERMEDIATE CA MUNICIPAL - AD [MF]		\$100,001 - \$250,000	Capital Gains	\$2,501 - \$5,000	\$1,001 - \$2,500
Joint - Balanced ⇒		\$100,001 -	Capital Gains	\$201 -	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CA SH-INTMDT TAX-FREE BD [MF]		\$250,000		\$1,000	
Joint - Balanced ⇒ CALIFORNIA MUNICIPAL (I) [MF]		\$100,001 - \$250,000	Capital Gains	\$2,501 - \$5,000	\$1,001 - \$2,500
Joint - Balanced ⇒ DELAWARE NATL HIGH YEILD MUNI BND CL I [MF]		\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Joint - Balanced ⇒ FIDELITY EMERGING MARKETS INDEX [MF]		\$100,001 - \$250,000	Capital Gains	\$15,001 - \$50,000	None
Joint - Balanced ⇒ FIDELITY EMERGING MARKETS INDEX [MF]		\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Joint - Balanced ⇒ FIDELITY GOVERNMENT CASH RESERVES [MF]		\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	None
Joint - Balanced ⇒ FIDELITY INTERNATIONAL INDEX [MF]		\$100,001 - \$250,000	Capital Gains	\$2,501 - \$5,000	\$5,001 - \$15,000
Joint - Balanced ⇒ FIDELITY MID CAP INDEX [MF]		\$15,001 - \$50,000	Capital Gains	\$2,501 - \$5,000	\$201 - \$1,000
Joint - Balanced ⇒ FIDELITY MONEY MARKET FUND PREMIUM [MF]		\$500,001 - \$1,000,000	Capital Gains	None	\$2,501 - \$5,000
DESCRIPTION: Divested in 2022					
Joint - Balanced ⇒ FIDELITY REAL ESTATE INDEX [MF]		\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Joint - Balanced ⇒ FIDELITY SMALL CAP INDEX [MF]		\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	None
Joint - Balanced ⇒ INVESCO EXCHANGE TRADED FD T S&P [MF]		\$50,001 - \$100,000	Capital Gains	None	None
Joint - Balanced [MF]	JT	\$1,000,001 - \$5,000,000	Capital Gains	\$15,001 - \$50,000	\$5,001 - \$15,000
Joint - Balanced ⇒ MAINSTAY MACKAY CA TAX FREE OPPS FD I [MF]		\$50,001 - \$100,000	Capital Gains	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Lennar 401K ⇒ American Funds EuroPacific Growth Fund Class R-6 [MF] DESCRIPTION: Closed in 2022		None	Tax-Deferred		
Lennar 401K ⇒ JP Morgan Small Cap Growth fund Class R6 [MF] DESCRIPTION: Closed in 2022		None	Tax-Deferred		
Lennar 401K ⇒ Large Cap Growth / Jennison Fund [MF] DESCRIPTION: Closed in 2022		None	Tax-Deferred		
Lennar 401K ⇒ Mass Mutual Mid Cap Growth Fund Class I [MF] DESCRIPTION: Closed in 2022		None	Tax-Deferred		
Lennar 401K ⇒ Vanguard Total Bond Market Index Fund [MF] DESCRIPTION: closed in 2022		None	Tax-Deferred		
Marc IRA ⇒ AB LARGE CAP GROWTH AD [MF]		\$50,001 - \$100,000	Tax-Deferred		
Marc IRA ⇒ AB SELECT US LONG/SHORT AD [MF]		None	Tax-Deferred		
Marc IRA ⇒ BLACKROCK FDS BRK DISC INSTL [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ BLACKROCK FDS INCM PTF INSTL [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ BLACKROCK HIGH INCOME FUND INSTITUTIONAL CLASS [MF]		\$50,001 - \$100,000	Tax-Deferred		
Marc IRA ⇒ BLACKROCK STRATEGIC INCOME OPPORTUNITIES PORT FUND INSLT CLASS [MF]		\$1,001 - \$15,000	Tax-Deferred		
Marc IRA ⇒ COLUMBIA OVERSEAS VALUE FUND-12 [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Marc IRA ⇒ FIDELITY 500 INDEX [MF]		\$50,001 - \$100,000	Tax-Deferred		
Marc IRA ⇒ FIDELITY ADV GROWTH OPPORT CLZ [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ FIDELITY ADV INVESTMENT GRD BOND CLZ [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ FIDELITY GOVERNMENT CASH RESERVES [MF]		\$1,001 - \$15,000	Tax-Deferred		
Marc IRA ⇒ FIDELITY INFLATION PROTECT BOND INDEX [MF]		None	Tax-Deferred		
Marc IRA ⇒ FIDELITY INTERNATIONAL INDEX [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ FIDELITY MONEY MARKET FUND PREMIUM [MF]		None	Tax-Deferred		
Marc IRA ⇒ FIDLITY ADV FOCUS EMERGING MKTS CLZ [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ FIRST EAGLE GLOBAL FUND CLASS I [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ FS MULTI-STRATEGY ALTERNATIVES FUND CLASS I [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ GS GQG PARTNERS INTL OPPS INST [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ LAZARD GL LISTED INFRASTRUCTURE PRT IN [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
Marc IRA ⇒ MARKET NEUTRAL INCOME FUND CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Marc IRA ⇒ MID CAP GROWTH EQUITY-INST CLASS [MF]		\$15,001 - \$50,000	Tax-Deferred		
Marc IRA ⇒ PARAMETRIC COMMODITY STRATEGY FUND INST [MF]		None	Tax-Deferred		
Marc IRA ⇒ PGIM SHORT-TER CORP BOND CL Z [MF]		\$1,001 - \$15,000	Tax-Deferred		
Marc IRA ⇒ THE HARTFORD EQUITY INCOME FUND-I [MF]		\$50,001 - \$100,000	Tax-Deferred		

* 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
Tustin Unified School District	School Board Trustee	\$3,143.53	\$7,542.06
Brown and Caldwell	Spouse Salary	\$69,865.40	\$898,485.18
Ardurra Group	Spouse Salary	\$145,384.56	\$92,873.07

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

◦ Allyson IRA

- Allyson Old 401K
DESCRIPTION: Allyson's 401K rolled over into Allyson IRA
- Ardurra 401K
- BC Marc old 401K
DESCRIPTION: Rolled over into Marc IRA
- Joint - Balanced
LOCATION: US
DESCRIPTION: After tax investment fund with Continuum
- Lennar 401K
DESCRIPTION: Old 401K rolled over into Marc IRA
- Marc IRA

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: Allyson Muniz Damikolas , 06/22/2023