



Filing ID #10060418

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: David Pan
Status: Congressional Candidate
State/District: CA46

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/12/2024
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
39 Schubert Ct [RP] LOCATION: Irvine, CA, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
3968 S. Van Ness Ave [RP] LOCATION: Los Angeles, CA, US		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	\$5,001 - \$15,000
Brio Direct from Webster Bank [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
Deutsche Bank Savings [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Marcus Savings [BA]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$201 - \$1,000
Non-federal Retirement Accounts ⇒ Fidelity Target Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		
Non-federal Retirement Accounts ⇒ Fidelity UC DOM Eq Index [PE]		\$1,001 - \$15,000	Tax-Deferred		
Non-federal Retirement Accounts ⇒ Fidelity UC Savings Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Non-federal Retirement Accounts ⇒ McKinsey Retirement Account (-) [PE]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: McKinsey retirement account target fund					
Non-federal Retirement Accounts ⇒ TIAA CREF Money Market [PE]		\$15,001 - \$50,000	Tax-Deferred		
Non-federal Retirement Accounts ⇒ TIAA CREF Stock Fund (-) [PE]		\$50,001 - \$100,000	Tax-Deferred		
Non-federal Retirement Accounts ⇒ TIAA Traditional [PE]		\$15,001 - \$50,000	Tax-Deferred		
Schools First Summer Saver Account [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$1 - \$200
Truist Mortgage Escrow Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
US Treasury Series I Savings Bonds [GS]		\$15,001 - \$50,000	Tax-Deferred		

* 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
University of California	Salary	\$74,042.00	\$185,642.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Truist Mortgage	December 15, 2020	Mortgage for 3968 S. Van Ness Avenue	\$500,001 - \$1,000,000
	Chase Mortgage	February 17, 2021	Mortgage for 39 Schubert Ct	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Editor	Telos Press
Treasurer	Telos-Paul Piccone Institute

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Non-federal Retirement Accounts

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: David Pan , 05/12/2024