



Filing ID #10050782

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Carolyn Bourdeaux
Status: Former Member
State/District: GA07

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2023
Filing Date: 05/3/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Adv Tiered Interest Checking [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of America Checking Account [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Bank of America Interest Checking [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of America Joint Checking Account [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bank of America Reward Saving [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of America Saving Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Edward Jones Investment Account ⇒ American Income Fund of America [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Investment Account ⇒ American New World CL A [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Investment Account ⇒ American Small Cap World Cl A [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Investment Account ⇒ American Washington Mutual Investors [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Investment Account ⇒ Edward Jones Money Market Investment Shares [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Experian Plc Ordinary Shares (EXPGF) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity 500 Index Premium Class [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Government Money Market [BA]	SP	\$250,001 - \$500,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Growth Company [MF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Intermediate Muni Income [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Limited Term Muni Income [MF]	SP	None	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity MidCap Index [MF]	SP	\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Total Market Index Premium Cl [MF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Zero International Index [MF]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Zero Total Market Index [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ J Sainsbury Plc Ord Ordinary Shares (JSNSF) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Janus Henderson Forty T [MF]	SP	\$50,001 - \$100,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒	SP	\$15,001 - \$50,000	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Janus Henderson Triton T [MF]					<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Moody's Corporation (MCO) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Oakmark Fund Investor Class [MF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Oracle Corporation (ORCL) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ T Rowe Price Health Sciences [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ TransUnion (TRU) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Verisk Analytics, Inc. (VRSK) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage Account 3 ⇒ Fidelity Limited Term Muni Bonds [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage Account 3 ⇒ Fidelity Zero Total Market Index [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage Account 3 ⇒ T Rowe Price Health Sciences [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Cash Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Emerging Mkts Index Premium [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Inflation Protected Bond Index Premium [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Inter Treasury Bond Index Premium [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity International Index Premium Class [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Brokerage Account 4 ⇒ Fidelity Real Estate Index Premium Cl [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Total Market Index Premium Cl [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Cash Account [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Deferred Annuity ⇒ Fidelity VIP International Index [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Deferred Annuity ⇒ Fidelity VIP Total Market Index [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Deferred Annuity ⇒ PIMCO VT Low Duration [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Government Money Market [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Inherited IRA ⇒ Fidelity Convertible Securities [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Inherited IRA ⇒ Fidelity Govt Money Market [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Inherited IRA ⇒ Fidelity Intermediate Treasury Bond Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Inherited IRA ⇒ Fidelity Puritan [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity Rollover IRA ⇒ Fidelity Puritan [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Puritan [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Georgia State University 457(B) ⇒ TIAA CREF Lifecycle 2035 Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Georgia State University ORP ⇒ TIAA Real Estate Account [RE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Georgia State University ORP ⇒ TIAA Traditional Annuity [FN]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Georgia State University ORP ⇒ TIAA-CREF Lifecycle 2030 Fund [MF]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Moody's Profit Participation Plan (Retirement) ⇒ FID Frdm INX 2025 [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Moody's Profit Participation Plan (Retirement) ⇒ FID Frdm INX 2030 [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Path2College Georgia 529 Plan ⇒ Aggressive Asset Allocation [5P] LOCATION: GA	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Peach State Reserves 401(k) ⇒ Large Cap Value Stock Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Peach State Reserves 401(k) ⇒ Lifecycle 2040 Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Peach State Reserves 401(k) ⇒ Mid Cap Core Stock Index Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Peach State Reserves 401(k) ⇒ Target Maturity Bond Fund 2024 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Peach State Reserves 401(k) ⇒ Target Maturity Bond Fund 2026 [BA] DESCRIPTION: Rollover from Target Maturity Bond Index Fund 2022		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Peach State Reserves 457(B) ⇒ Large Cap Value Stock Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Peach State Reserves 457(B) ⇒ Lifecycle 2040 Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Peach State Reserves 457(B) ⇒ Mid Cap Core Stock Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Peach State Reserves 457(B) ⇒ Small Cap Core Stock Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
RELX Inc. US Salary Investment Plan (Retirement Plan) ⇒ Vanguard Target Retirement Trust Plus 2025 [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
RELX Inc. US Salary Investment Plan (Retirement Plan) ⇒ Vanguard Target Retirement Trust Plus 2030 [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Western Southern SmartSelect Annuity [FN]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Brokerage Account 2 ⇒ Fidelity Growth Company [MF] DESCRIPTION: Reinvestment of long term capital gains	SP	12/27/2022	P	\$1,001 - \$15,000	
Fidelity Brokerage Account 2 ⇒ Fidelity Intermediate Muni Income [MF]	SP	01/18/2022	P	\$1,001 - \$15,000	
Fidelity Brokerage Account 2 ⇒ Fidelity Intermediate Muni Income [MF]	SP	02/22/2022	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Intermediate Muni Income [MF]	SP	01/18/2022	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Intermediate Muni Income [MF]	SP	12/29/2022	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity Limited Term Muni Income [MF]	SP	12/29/2022	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Fidelity MidCap Index [MF]	SP	12/29/2022	P	\$50,001 - \$100,000	
Fidelity Brokerage Account 2 ⇒ Fidelity Total Market Index Premium Cl [MF]	SP	01/18/2022	P	\$1,001 - \$15,000	
Fidelity Brokerage Account 2 ⇒	SP	01/18/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Zero International Index [MF]					
Fidelity Brokerage Account 2 ⇒ Fidelity Zero International Index [MF]	SP	12/16/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment					
Fidelity Brokerage Account 2 ⇒ Fidelity Zero International Index [MF]	SP	02/22/2022	P	\$15,001 - \$50,000	
Fidelity Brokerage Account 2 ⇒ Fidelity Zero International Index [MF]	SP	01/18/2022	P	\$15,001 - \$50,000	
Fidelity Brokerage Account 2 ⇒ Fidelity Zero Total Market Index [MF]	SP	12/16/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment					
Fidelity Brokerage Account 2 ⇒ Fidelity Zero Total Market Index [MF]	SP	02/22/2022	P	\$50,001 - \$100,000	
Fidelity Brokerage Account 2 ⇒ Fidelity Zero Total Market Index [MF]	SP	01/18/2022	P	\$50,001 - \$100,000	
Fidelity Brokerage Account 2 ⇒ Fidelity Zero Total Market Index [MF]	SP	12/29/2022	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity Brokerage Account 2 ⇒ Janus Henderson Triton T [MF]	SP	12/21/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment of long term capital gains					
Fidelity Brokerage Account 4 ⇒ Fidelity Emerging Markets Index Premium [MF]		11/14/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Inflation Protected Bond Index Premium [MF]		03/28/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Inflation Protected Bond Index Premium [MF]		11/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Inter Treasury Bond Index Premium [MF]		11/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity International Index Premium Class [MF]		03/28/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Brokerage Account 4 ⇒ Fidelity International Index Premium Class [MF]		11/14/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Real Estate Index Premium Cl [MF]		03/28/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account 4 ⇒ Fidelity Total Market Index Premium Cl [MF]		03/28/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Inherited IRA ⇒ Fidelity Puritan [MF]	SP	10/14/2022	P	\$1,001 - \$15,000	
Fidelity Rollover IRA ⇒ Fidelity Puritan [MF]	SP	12/16/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment					
Fidelity Rollover IRA ⇒ Fidelity Puritan [MF]	SP	07/1/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment					
Fidelity Rollover IRA ⇒ Fidelity Puritan [MF]	SP	04/1/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment					
Fidelity Rollover IRA ⇒ Fidelity Puritan [MF]	SP	10/14/2022	P	\$50,001 - \$100,000	
DESCRIPTION: Long term capital gains and dividend reinvestment					
Fidelity Roth IRA ⇒ Fidelity Puritan [MF]	SP	10/14/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment					
Peach State Reserves 401(k) ⇒ Target Maturity Bond Fund 2022 [MF]		12/29/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Peach State Reserves 401(k) ⇒ Target Maturity Bond Fund 2026 [MF]		12/29/2022	P	\$1,001 - \$15,000	
RELX Inc. US Salary Investment Plan (Retirement Plan) ⇒ Vanguard Target Retirement 2040 [MF]	SP	08/11/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>

* 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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Better Mortgage Corporation	June 2021	Mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2010	Carolyn Bourdeaux and State of Georgia - 401(k)	Peach State Reserves is a defined contribution plan that provides service retirement benefits.
December 2020	Carolyn Bourdeaux and Georgia State University - Optional Retirement Plan	Defined contribution plan that provides service retirement benefits. Former employer no longer contributes to the plan.
December 2020	Carolyn Bourdeaux and Georgia State University - 457(b)	Defined contribution plan that provides service retirement benefits.
May 2010	Carolyn Bourdeaux and State of Georgia - 457(b)	Peach State Reserves is a defined contribution plan that provides service retirement benefits.
December 2022	University of Georgia	Serve as a Senior Visiting Scholar with the School of Public and International Affairs, Spring 2023-Spring 2024 semesters.

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.

SCHEDULE A AND B ASSET CLASS DETAILS

◦ Edward Jones Investment Account LOCATION: US

- Fidelity Brokerage Account 2 (Owner: SP)
LOCATION: US
- Fidelity Brokerage Account 3 (Owner: JT)
LOCATION: US
- Fidelity Brokerage Account 4
LOCATION: US
- Fidelity Deferred Annuity (Owner: SP)
- Fidelity Inherited IRA (Owner: SP)
- Fidelity Rollover IRA (Owner: SP)
- Fidelity Roth IRA (Owner: SP)
- Georgia State University 457(B)
DESCRIPTION: GSU 457(B) held through TIAA-CREF
- Georgia State University ORP
DESCRIPTION: GSU ORP held through TIAA-CREF
- Moody's Profit Participation Plan (Retirement) (Owner: SP)
- Path2College Georgia 529 Plan (Owner: SP)
LOCATION: GA
- Peach State Reserves 401(k)
- Peach State Reserves 457(B)
- RELX Inc. US Salary Investment Plan (Retirement Plan) (Owner: SP)

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. Carolyn Bourdeaux , 05/3/2023