



Filing ID #10059797

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Anthony Portantino
Status: Congressional Candidate
State/District: CA30

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/5/2024
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 |
|--|-------|--------------------------|----------------|-------------------------------------|-----------------------------|
| 1396 Milano Dr.W.Sacrament [RP] LOCATION: West Sacramento, Yolo, CA, US | JT | \$250,001 - \$500,000 | Rent | \$5,001 - \$15,000 | \$5,001 - \$15,000 |
| 401K ⇒ Savings Plus 401K Bond Fund [OT] DESCRIPTION: 401K | | \$50,001 - \$100,000 | Tax-Deferred | | |
| 401K ⇒ Savings Plus 401K Bond Index Fund [OT] DESCRIPTION: 401K | | \$50,001 - \$100,000 | Tax-Deferred | | |
| 401K ⇒ Savings Plus 401K Diversified Real Return [OT] DESCRIPTION: 401K | | \$15,001 - \$50,000 | Tax-Deferred | | |
| 401K ⇒ Savings Plus 401K International Index Fund [OT] DESCRIPTION: 401K | | \$50,001 - \$100,000 | Tax-Deferred | | |
| 401K ⇒ Savings Plus 401K Large Cap Index Fund [OT] | | \$100,001 - \$250,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------------|--------------------------|-------------------------------|-----------------------|
| DESCRIPTION: 401K | | | | | |
| 401K ⇒ Savings Plus 401K Short Term Inv Fund [OT] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| DESCRIPTION: 401K | | | | | |
| 401K ⇒ Savings Plus 401K Small Cap Index Fund [OT] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| DESCRIPTION: 401K | | | | | |
| Citibank [BA] | JT | \$1,000,001 - \$5,000,000 | Interest | \$5,001 - \$15,000 | \$201 - \$1,000 |
| Comcast Corporation - Class A Common Stock (CMCSA) [ST] | SP | \$1,001 - \$15,000 | Capital Gains | \$201 - \$1,000 | Not Applicable |
| Comcast NBC Uni 401K Vanguard Target 2030 [OT] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| DESCRIPTION: Spouse 401K | | | | | |
| Dodge & Cox Balanced Fund - Class I (DODBX) [MF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Dodge & Cox Income Fund - Class I (DODIX) [MF] | JT | \$15,001 - \$50,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1,001 - \$2,500 |
| I-Bond [GS] | JT | \$15,001 - \$50,000 | Interest | None | None |
| JP Morgan Chase CD [BA] | JT | \$15,001 - \$50,000 | None | | |
| Partners [BA] | JT | \$250,001 - \$500,000 | Interest | \$2,501 - \$5,000 | \$1,001 - \$2,500 |
| Vanguard Federal Money Market Account [BA] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Vanguard FTSE All World Ex US ETF (VEU) [EF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$201 - \$1,000 |
| Vanguard Growth ETF (VUG) [EF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Vanguard Real Estate ETF (VNQ) [EF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Vanguard Short Term Investment Grade [BA] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-------------------------|--------------------------|-------------------------------|-----------------------|
| Vanguard Short-Term Bond ETF (BSV) [EF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Vanguard Small-Cap ETF (VB) [EF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Vanguard STAR Fund (VGSTX) [MF] | JT | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Vanguard Treasury Money Market Fund (VUSXX) [MF] | JT | \$250,001 - \$500,000 | Dividends | \$1,001 - \$2,500 | Not Applicable |
| Vanguard Value ETF (VTV) [EF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Walt Disney Company (DIS) [ST] | JT | \$50,001 - \$100,000 | Dividends | \$1 - \$200 | None |
| WBD 401K Int Stock Index [OT] | SP | \$100,001 - \$250,000 | Tax-Deferred | | |
| DESCRIPTION: Spouse 401K | | | | | |
| WBD 401K Lg CP US Stk Idx [OT] | SP | \$250,001 - \$500,000 | Tax-Deferred | | |
| DESCRIPTION: Spouse 401K | | | | | |
| WBD 401K Sm & Md US Stk Idx [OT] | SP | \$100,001 - \$250,000 | Tax-Deferred | | |
| DESCRIPTION: Spouse 401K | | | | | |
| WBD 401K Total Return Bond [OT] | SP | \$500,001 - \$1,000,000 | Tax-Deferred | | |
| DESCRIPTION: Spouse 401K | | | | | |

* 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 |
|---------------------|---------------|-------------------------------|-----------------------|
| State of California | Salary | \$121,590.30 | \$119,702.92 |
| NBC Universal | Spouse Salary | N/A | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|----------|----------------|--|-----------------------|
| JT | New Rez | December, 2006 | Mortgage on 1396 Milano Dr W. Sacramento, CA | \$100,001 - \$250,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|-----------------------|--|
| Member | Santa Monica Conservancy Advisory Board |
| Member | Seismic Safety Commission |
| Member | California Cultural and Historical Endowment |
| Member | California Genocide Committee |
| Advisory Board Member | Professional Child Development Associates |
| Advisory Board Member | Sycamores |

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|---------------|-------------------|--|
| December 2006 | City of La Canada | Member of CALPERS pension plan for 8 years service on City Council estimated at \$80/month at retirement |

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

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|--------|
| ◦ 401K |
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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: Anthony Portantino , 05/5/2024