



Filing ID #10050864

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Connie Conway
Status: Former Member
State/District: CA22

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2023
Filing Date: 03/30/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of the Sierra [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of the Sierra [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of the West [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Beneficial IRA ⇒ Principal Capital Appreciation [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Beneficial IRA ⇒ Principal Diversified Real Estate [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Beneficial IRA ⇒ Principal Global Real Estate [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Beneficial IRA ⇒ Principal High Yield [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Beneficial IRA ⇒ Principal Real Estate Sec [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Beneficial IRA ⇒ Principal Sam Balanced [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Beneficial IRA ⇒ Principal Small-Mid Cap [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Beneficial IRA ⇒ Principal Spectrum Pref [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Brokerage Account ⇒ Baidu, Inc. - American Depositary Shares, each representing 8 ordinary share (BIDU) [ST]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Brokerage Account ⇒ Block, Inc. Class A Common Stock, (SQ) [ST]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Brokerage Account ⇒ ChargePoint Holdings, Inc. (CHPT) [ST]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Brokerage Account ⇒ Dutch Bros Inc. Class A (BROS) [ST]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Brokerage Account ⇒ Fastenal Company (FAST) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Brokerage Account ⇒ Meta Platforms, Inc. - Class A (FB) [ST]	SP	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Brokerage Account ⇒ Rivian Automotive, Inc. - Class A (RIVN) [ST]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Brokerage Account ⇒ Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Brokerage Account ⇒ Tesla, Inc. (TSLA) [ST]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Brokerage Account ⇒ Transdigm Group Incorporated (TDG) [ST]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Galaxy Gig Harbor LLC [OL]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: Gig Harbor, CA, US DESCRIPTION: Ownership interest in movie theater.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Installment sale note on N. Mahaleb Property [DO]		\$100,001 - \$250,000	installment payments	\$5,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ Principal Capital Appreciation [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Divers International [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Diversified Real Estate [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Global Real Estate [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal International Emerg [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Large Cap [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Mid Cap [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Origin [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Real Estate Sec [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Sam Strategic [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Small Cap [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Small-Mid Cap [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Principal Spectrum Pref [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Principal Financial Group Defined Benefit Plan [PE]	SP	Undetermined	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Principal Financial Services Deferred Compensation Plan [PE]	SP	Undetermined	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ AB Small Cap Growth [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ Origin Emerging Markets [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ Prin LifeTime Hybrid 2050 [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ Principal Financial Group ESOP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ Principal Global Investors Core Plus Bond [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ Principal Global Investors Diversified International [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ Principal Global Investors Large Cap S&P 500 [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ Principal Global Investors MidCap [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ Principal Real Estate US Property [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Principal Global 401(k) ⇒ T Rowe Price Large Cap Growth [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Principal PrinFlex Life Policy [WU]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Principal Variable Universal Life Income Policies [WU]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Principal Variable Universal Life Income Policy [WU]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Combined value of 3 policies					
Roth IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Roth IRA ⇒ Principal Divers International [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ Principal International Emerg [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ Principal Mid Cap [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ Principal Origin [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Apple Inc. (AAPL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ ARK Fintech Innovation ETF (ARKF) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Blue Chip [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Blue Chip [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Divers International [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Equity [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Global Real Estate [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal International Emerg [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Principal International Emerg [MF]					<input type="checkbox"/>
SEP IRA ⇒ Principal Large Cap [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Mid Cap [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Mid Cap [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Origin [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Origin [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Real Estate Sec [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Real Estate Sec [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Sam Strategic [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Small Cap [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Small Cap [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Small-Mid Cap [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Principal Spectrum Pref [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Tesla, Inc. (TSLA) [ST]	SP	\$1,001 - \$15,000	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?
IRA ⇒ Principal Sam Strategic [MF]		12/20/2022	P	\$1,001 - \$15,000	
SEP IRA ⇒ Principal Equity [MF]	SP	12/13/2022	P	\$1,001 - \$15,000	
SEP IRA ⇒ Principal Large Cap [MF]	SP	12/13/2022	P	\$1,001 - \$15,000	
SEP IRA ⇒ Principal Mid Cap [MF]	SP	12/13/2022	P	\$1,001 - \$15,000	

* 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
Craig M Vejvoda, CLU	Spouse Salary	N/A
The Villines Group	Consulting fee	\$25,000.00
Principal Financial Group Deferred Compensation Plan	Spouse Deferred Compensation Distribution	N/A
Principal Financial Group Defined Benefit Plan	Spouse Defined Benefit Distribution	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Right Start Mortgage	July 2020	Mortgage on second home	\$250,001 - \$500,000
JT	Tucoemas	January 2022	Mortgage on personal residence	\$250,001 - \$500,000
JT	Huntington National Bank	2021	HELOC	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Consultant	The Villines Group

SCHEDULE F: AGREEMENTS

None disclosed.

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

- Beneficial IRA
- Brokerage Account (Owner: SP)
LOCATION: US
- IRA
- Principal Global 401(k) (Owner: SP)
- Roth IRA (Owner: SP)
- SEP IRA
- SEP IRA (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. Connie Conway , 03/30/2023