



Filing ID #10064663

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Dr. Paula Williams Swift  
**Status:** Congressional Candidate  
**State/District:** CA40

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 04/08/2025  
**Period Covered:** 01/01/2024– 04/15/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401k Retirement Account [AB]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: 401K from previous employer					
Life Insurance [WU]	SP	\$250,001 - \$500,000	None		

\* 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
Wintrust Mortgage	Spouse's Employer	\$23,047.49	\$90,527.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Department of Education/Aidvantage	1988 - 2024	Student Loans	\$250,001 - \$500,000

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
SP	Discover	1997 - 2025	Credit Card	\$10,000 - \$15,000
JT	Department of Education	2022 - 2025	Student Loans for Son	\$50,001 - \$100,000
SP	Sofi Bank	2024	Personal Loan	\$15,001 - \$50,000
SP	Upstart	2024	Personal Loan	\$15,001 - \$50,000

## **SCHEDULE E: POSITIONS**

None disclosed.

## **SCHEDULE F: AGREEMENTS**

None disclosed.

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

<b>Source (Name and Address)</b>	<b>Brief Description of Duties</b>
AAJSocal (Los Angeles, CA, US)	Company Retreat Facilitator
Estate of William C. Montague, Jr. (Seal Beach, CA, US)	Compensation for Probate Executor Services

## **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:** Dr. Paula Williams Swift , 04/08/2025