



Filing ID #10067086

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Jill Naomi Tokuda  
**Status:** Member  
**State/District:** HI02

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 08/11/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset      | Income Type(s) | Income | Tx. > \$1,000?           |
|---|-------|---------------------|----------------|--------|--------------------------|
| First Hawaiian Bank [BA]<br>DESCRIPTION: Checking & Savings Account   |       | \$1,001 - \$15,000  | None           |        | <input type="checkbox"/> |
| First Hawaiian Bank [BA]<br>DESCRIPTION: Savings account - dependent child #1                               | DC    | \$1,001 - \$15,000  | None           |        | <input type="checkbox"/> |
| First Hawaiian Bank [BA]<br>DESCRIPTION: Checking account   | SP    | \$15,001 - \$50,000 | None           |        | <input type="checkbox"/> |
| First Hawaiian Bank [BA]<br>DESCRIPTION: Savings account - dependent child #2                               | DC    | \$1,001 - \$15,000  | None           |        | <input type="checkbox"/> |
| Hawaii Employees Retirement System [PE]   |       | Undetermined        | Tax-Deferred   |        | <input type="checkbox"/> |
| Empower - State of Hawaii Deferred Compensation Plan ⇒<br>EuroPacific Growth Fund Cl R-6 (RERGX) [MF]       |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| Empower - State of Hawaii Deferred Compensation Plan ⇒<br>Harbor Small Cap Value Fund Insti Cl (HASCX) [MF] |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| Empower - State of Hawaii Deferred Compensation Plan ⇒  |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |

| Asset  | Owner | Value of Asset        | Income Type(s) | Income | Tx. > \$1,000?                      |
|--|-------|-----------------------|----------------|--------|-------------------------------------|
| MainStay Large Cap Growth Fund Class I (MLAIX) [MF]  |       |                       |                |        | <input type="checkbox"/>            |
| Empower - State of Hawaii Deferred Compensation Plan ⇒<br>MFS International Value Fund Class R6 (MINJX) [MF]     |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/>            |
| Empower - State of Hawaii Deferred Compensation Plan ⇒<br>WmBlair Small-Mid Cap Growth Fund Class N (WSMNX) [MF] |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/>            |
| Empower - State of Hawaii Deferred Compensation Plan ⇒<br>WTC-CIF II Research Value (REAVAX) [MF]                |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/>            |
| Howard Hughes 401K Plan ⇒<br>Fidelity 500 Index Fund (FXAIX) [MF]  | SP    | \$250,001 - \$500,000 | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Kalliope, LLC ⇒<br>First Hawaiian Bank [BA]<br><br>DESCRIPTION: Checking & Savings account                       |       | \$50,001 - \$100,000  | None           |        | <input type="checkbox"/>            |
| Raymond James Roth IRA ⇒<br>Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]                           |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Calvert Small Cap Fund Class I (CSVIX) [MF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Calvert U.S. Large Cap Value Responsible Index Fund Class I (CFJIX) [MF]             |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Impax International Sustainable Economy Fund Institutional Class (PXNIX) [MF]        |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Impax Large Cap Fund Institutional Class (PXLIX) [MF]                                |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]                                |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>iShares ESG Screened S&P Mid-Cap ETF (XJH) [EF]                                      |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>John Hancock ESG International Equity Fund Class I (JTQIX) [MF]                      |       | None                  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |

| Asset   | Owner | Value of Asset      | Income Type(s) | Income | Tx. > \$1,000?                      |
|---|-------|---------------------|----------------|--------|-------------------------------------|
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]                       |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Nuveen ESG Mid-Cap Value ETF (NUMV) [EF]                          |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]      |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]                |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Raymond James - Cash [IH]   |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/>            |
| Raymond James Roth IRA ⇒<br>Vanguard ESG International Stock ETF (VSGX) [EF]                  |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Vanguard ESG U.S. Stock ETF (ESGV) [EF]                           |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>American Balanced Fund Class F-2 Shs (AMBFX) [MF]                  |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>American Funds Global Insight Fund Class F-2 (AGVGX) [MF]          |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF]     |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>American Funds Strategic Bond Fund Class F-2 (ANBFX) [MF]          |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>Capital Income Builder Cl F-2 Shs (CAIFX) [MF]                     |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>Capital World Growth and Income Fund Class F-2 Shares (WGIFX) [MF] |       | \$15,001 - \$50,000 | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>Raymond James - Cash [IH]  |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/>            |
|   |       |                     |                |        |                                     |

| Asset  | Owner | Value of Asset      | Income Type(s) | Income | Tx. > \$1,000?                      |
|--|-------|---------------------|----------------|--------|-------------------------------------|
| Raymond James SEP IRA ⇒<br>SMALLCAP World Fund, Inc., Class F-2 Shs (SMCFX) [MF]         |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]         |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>The Growth Fund of America Class F-2 Shares (GFFFX) [MF]      |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>The Investment Company of America, Class F-2 Shs (ICAFX) [MF] |       | \$15,001 - \$50,000 | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>Washington Mutual Investors Fund Cl F-2 Shs (WMFFX) [MF]      |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input checked="" type="checkbox"/> |

\* 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 B: TRANSACTIONS

| Asset  | Owner | Date       | Tx. Type | Amount             | Cap. Gains > \$200? |
|--|-------|------------|----------|--------------------|---------------------|
| Raymond James SEP IRA ⇒<br>The Investment Company of America, Class F-2 Shs (ICAFX) [MF] |       | 11/08/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Strategic Bond Fund Class F-2 (ANBFX) [MF]     |       | 11/08/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]         |       | 11/08/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>The Growth Fund of America Class F-2 Shares (GFFFX) [MF]      |       | 11/08/2024 | P        | \$1,001 - \$15,000 |                     |
| Howard Hughes 401K Plan ⇒<br>Fidelity 500 Index Fund (FXAIX) [MF]                        | SP    | 01/03/2024 | P        | \$1,001 - \$15,000 |                     |
| Howard Hughes 401K Plan ⇒<br>Fidelity 500 Index Fund (FXAIX) [MF]                        | SP    | 04/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Howard Hughes 401K Plan ⇒  | SP    | 07/01/2024 | P        | \$1,001 - \$15,000 |                     |

| Asset  | Owner | Date       | Tx. Type    | Amount             | Cap. Gains > \$200?      |
|--|-------|------------|-------------|--------------------|--------------------------|
| Fidelity 500 Index Fund (FXAIX) [MF]   |       |            |             |                    |                          |
| Howard Hughes 401K Plan ⇒<br>Fidelity 500 Index Fund (FXAIX) [MF]                                    | SP    | 10/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]               |       | 08/21/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Calvert U.S. Large Cap Value Responsible Index Fund Class I (CFJIX) [MF] |       | 08/21/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]                    |       | 08/21/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>John Hancock ESG International Equity Fund Class I (JTQIX) [MF]          |       | 08/09/2024 | S           | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Nuveen ESG Mid-Cap Value ETF (NUMV) [EF]                                 |       | 08/21/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Vanguard ESG International Stock ETF (VSGX) [EF]                         |       | 08/21/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Vanguard ESG U.S. Stock ETF (ESGV) [EF]                                  |       | 08/21/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]             |       | 04/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]             |       | 07/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]             |       | 10/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]             |       | 08/21/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset   | Owner | Date       | Tx. Type    | Amount             | Cap. Gains > \$200?      |
|---|-------|------------|-------------|--------------------|--------------------------|
| Raymond James Roth IRA ⇒<br>Impax Large Cap Fund Institutional Class (PXLIX) [MF]                         |       | 06/21/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Impax Large Cap Fund Institutional Class (PXLIX) [MF]                         |       | 08/21/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Impax International Sustainable Economy Fund Institutional Class (PXNIX) [MF] |       | 08/09/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Impax International Sustainable Economy Fund Institutional Class (PXNIX) [MF] |       | 08/21/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]                            |       | 02/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]                            |       | 03/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]                            |       | 04/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF]                 |       | 02/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]                          |       | 02/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF]                 |       | 03/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]                          |       | 03/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Balanced Fund Class F-2 Shs (AMBFX) [MF]                              |       | 03/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>Capital Income Builder Cl F-2 Shs (CAIFX) [MF]                                 |       | 03/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒   |       | 03/12/2024 | P           | \$1,001 - \$15,000 |                          |

| Asset   | Owner | Date       | Tx. Type | Amount             | Cap. Gains > \$200? |
|---|-------|------------|----------|--------------------|---------------------|
| Capital World Growth and Income Fund Class F-2 Shares (WGIFX) [MF]                        |       |            |          |                    |                     |
| Raymond James SEP IRA ⇒<br>The Investment Company of America, Class F-2 Shs (ICAFX) [MF]  |       | 03/14/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>Washington Mutual Investors Fund Cl F-2 Shs (WMFFX) [MF]       |       | 03/14/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Strategic Bond Fund Class F-2 (ANBFX) [MF]      |       | 03/18/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF] |       | 04/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]          |       | 04/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF] |       | 05/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]            |       | 05/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]            |       | 06/03/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]            |       | 07/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]            |       | 08/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]            |       | 08/21/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]            |       | 09/03/2024 | P        | \$1,001 - \$15,000 |                     |
|   |       |            |          |                    |                     |

| Asset  | Owner | Date       | Tx. Type    | Amount             | Cap. Gains > \$200?      |
|--|-------|------------|-------------|--------------------|--------------------------|
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF] |       | 10/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 02/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 03/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 04/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 05/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 06/03/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 07/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 08/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 09/03/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 10/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF] |       | 11/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 11/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]        |       | 11/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen ESG Mid-Cap Value ETF (NUMV) [EF]           |       | 11/12/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒   |       | 11/12/2024 | S           | \$1,001 - \$15,000 | <input type="checkbox"/> |



| Asset   | Owner | Date       | Tx. Type    | Amount             | Cap. Gains > \$200?      |
|---|-------|------------|-------------|--------------------|--------------------------|
| Vanguard ESG U.S. Stock ETF (ESGV) [EF]   |       |            | (partial)   |                    | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]                         |       | 11/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>iShares ESG Select Screened S&P Mid-Cap ETF (XJH) [EF]                        |       | 11/12/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Vanguard ESG International Stock ETF (VSGX) [EF]                              |       | 11/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]                    |       | 11/12/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Calvert U.S. Large Cap Value Responsible Index Fund Class I (CFJIX) [MF]      |       | 11/12/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Calvert Small Cap Fund Class I (CSVIX) [MF]                                   |       | 11/12/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]                            |       | 11/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]                  |       | 11/12/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Impax Large Cap Fund Institutional Class (PXLIX) [MF]                         |       | 11/12/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Roth IRA ⇒<br>Impax International Sustainable Economy Fund Institutional Class (PXNIX) [MF] |       | 11/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>PIMCO Total Return ESG Fund Class I-2 (PRAPX) [MF]                            |       | 12/02/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Nuveen Core Impact Bond Fund A (TSBRX) [MF]                                   |       | 12/02/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Parnassus Core Equity Fund-Institutional Shares (PRILX)                       |       | 12/09/2024 | P           | \$1,001 - \$15,000 |                          |

| Asset   | Owner | Date       | Tx. Type    | Amount             | Cap. Gains > \$200?      |
|---|-------|------------|-------------|--------------------|--------------------------|
| [MF]  |       |            |             |                    |                          |
| Raymond James Roth IRA ⇒<br>Calvert Small Cap Fund Class I (CSVIX) [MF]                                   |       | 12/13/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Calvert U.S. Large Cap Value Responsible Index Fund Class I (CFJIX) [MF]      |       | 12/13/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]                    |       | 12/17/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]                  |       | 12/23/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James Roth IRA ⇒<br>Impax International Sustainable Economy Fund Institutional Class (PXNIX) [MF] |       | 12/23/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]                          |       | 05/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>Capital World Growth and Income Fund Class F-2 Shares (WGIFX) [MF]             |       | 05/28/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>American Funds Global Insight Fund Class F-2 (AGVGX) [MF]                      |       | 05/31/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF]                 |       | 06/03/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]                          |       | 06/03/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Balanced Fund Class F-2 Shs (AMBFX) [MF]                              |       | 06/11/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>Capital Income Builder CI F-2 Shs (CAIFX) [MF]                                 |       | 06/11/2024 | P           | \$1,001 - \$15,000 |                          |
|   |       |            |             |                    |                          |

| Asset   | Owner | Date       | Tx. Type | Amount             | Cap. Gains > \$200? |
|---|-------|------------|----------|--------------------|---------------------|
| Raymond James SEP IRA ⇒<br>Capital World Growth and Income Fund Class F-2 Shares (WGIFX) [MF] |       | 06/11/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>The Investment Company of America, Class F-2 Shs (ICAFX) [MF]      |       | 06/13/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>Washington Mutual Investors Fund Cl F-2 Shs (WMFFX) [MF]           |       | 06/13/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Strategic Bond Fund Class F-2 (ANBFX) [MF]          |       | 06/17/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF]     |       | 07/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]              |       | 07/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF]     |       | 08/01/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF]     |       | 09/03/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]              |       | 09/03/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Balanced Fund Class F-2 Shs (AMBFX) [MF]                  |       | 09/17/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>Capital Income Builder Cl F-2 Shs (CAIFX) [MF]                     |       | 09/17/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>Capital World Growth and Income Fund Class F-2 Shares (WGIFX) [MF] |       | 09/17/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒   |       | 09/19/2024 | P        | \$1,001 - \$15,000 |                     |

| Asset   | Owner | Date       | Tx. Type    | Amount             | Cap. Gains > \$200?      |
|---|-------|------------|-------------|--------------------|--------------------------|
| The Investment Company of America, Class F-2 Shs (ICAFX) [MF]                             |       |            |             |                    |                          |
| Raymond James SEP IRA ⇒<br>Washington Mutual Investors Fund Cl F-2 Shs (WMFFX) [MF]       |       | 09/19/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Funds Strategic Bond Fund Class F-2 (ANBFX) [MF]      |       | 09/28/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF] |       | 10/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]          |       | 10/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF] |       | 11/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]          |       | 11/01/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF] |       | 11/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>The Investment Company of America, Class F-2 Shs (ICAFX) [MF]  |       | 11/12/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]          |       | 11/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>SMALLCAP World Fund, Inc., Class F-2 Shs (SMCFX) [MF]          |       | 11/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Funds Global Insight Fund Class F-2 (AGVGX) [MF]      |       | 11/12/2024 | P           | \$1,001 - \$15,000 |                          |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF] |       | 12/02/2024 | P           | \$1,001 - \$15,000 |                          |

| Asset   | Owner | Date       | Tx. Type | Amount             | Cap. Gains > \$200? |
|---|-------|------------|----------|--------------------|---------------------|
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]              |       | 12/02/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Balanced Fund Class F-2 Shs (AMBFX) [MF]                  |       | 12/17/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Global Insight Fund Class F-2 (AGVFX) [MF]          |       | 12/17/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>Capital World Growth and Income Fund Class F-2 Shares (WGIFX) [MF] |       | 12/18/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>The Investment Company of America, Class F-2 Shs (ICAFX) [MF]      |       | 12/18/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Strategic Bond Fund Class F-2 (ANBFX) [MF]          |       | 12/19/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>The Growth Fund of America Class F-2 Shares (GFFFX) [MF]           |       | 12/19/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>Capital Income Builder CI F-2 Shs (CAIFX) [MF]                     |       | 12/20/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>Washington Mutual Investors Fund CI F-2 Shs (WMFFX) [MF]           |       | 12/20/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>SMALLCAP World Fund, Inc., Class F-2 Shs (SMCFX) [MF]              |       | 12/23/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>American Funds Multi-Sector Income Fund Class F-2 (MIAYX) [MF]     |       | 01/02/2024 | P        | \$1,001 - \$15,000 |                     |
| Raymond James SEP IRA ⇒<br>The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]              |       | 01/02/2024 | P        | \$1,001 - \$15,000 |                     |

\* 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      |
|------------------------------------|---------------|-------------|
| Howard Hughes Corporation          | Spouse Salary | N/A         |
| Hawaii Employees Retirement System | Pension       | \$33,042.24 |

**SCHEDULE D: LIABILITIES**

| Owner | Creditor            | Date Incurred | Type     | Amount of Liability   |
|-------|---------------------|---------------|----------|-----------------------|
|       | First Hawaiian Bank | January 2013  | Mortgage | \$250,001 - \$500,000 |

**SCHEDULE E: POSITIONS**

| Position           | Name of Organization                    |
|--------------------|---|
| Board of Directors | Congressional Progressive Caucus Center |

**SCHEDULE F: AGREEMENTS**

| Date          | Parties To   | Terms of Agreement  |
|---------------|--|---|
| November 2018 | Filer and Hawaii Employer-Union Health Benefits Trust Fund | Retiree health benefits   |
| November 2018 | Filer and Hawaii Employees Retirement System               | Pension Plan  |
| November 2018 | Filer and State of Hawaii Deferred Compensation Plan       | Defined benefit plan that provides service retirement benefits. |

**SCHEDULE G: GIFTS**

None disclosed.

**SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS**

| Trip Details             |            |            |   |                  | Inclusions                          |                                     |                          |
|--------------------------|------------|------------|---|------------------|-------------------------------------|-------------------------------------|--------------------------|
| Source                   | Start Date | End Date   | Itinerary                                     | Days at Own Exp. | Lodging?                            | Food?                               | Family?                  |
| Bipartisan Policy Center | 03/22/2024 | 03/25/2024 | Washington, DC - Sacramento, CA - Kahului, HI | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

| Trip Details   |            |            |                              |                  | Inclusions                          |                                     |                          |
|--|------------|------------|------------------------------|------------------|-------------------------------------|-------------------------------------|--------------------------|
| Source   | Start Date | End Date   | Itinerary                    | Days at Own Exp. | Lodging?                            | Food?                               | Family?                  |
| Ministry of Foreign Affairs of the Republic of China -Taiwan | 08/11/2024 | 08/15/2024 | Honolulu - Taipei - Honolulu | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Howard Hughes 401K Plan (Owner: SP)  
DESCRIPTION: Fidelity Investments
- Raymond James SEP IRA  
DESCRIPTION: Cash
- Raymond James Roth IRA  
DESCRIPTION: Capital Group/American Funds
- Empower - State of Hawaii Deferred Compensation Plan
- Kalliope, LLC  
LOCATION: US

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. Jill Naomi Tokuda , 08/11/2025