



Filing ID #10067339

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Sam T. Liccardo  
**Status:** Member  
**State/District:** CA16

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2024  
**Filing Date:** 05/09/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Express Savings [BA]		\$15,001 - \$50,000	Interest	Not Applicable	\$2,501 - \$5,000
Residential Property [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$50,001 - \$100,000
LOCATION: Imperial Beach / San Diego County, CA, US					
Vacation Property [RP]		\$1,000,001 - \$5,000,000	Rent	None	\$15,001 - \$50,000
LOCATION: Tahoe City/ Placer County, CA, US					
DESCRIPTION: Condominium owned by four siblings, and sold in November of 2024.					
CalPERS Pension Sam Liccardo ⇒ CalPERS [DB]		\$250,001 - \$500,000	Capital Gains, Interest	Not Applicable	None
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ American States Water Company Common Stock (AWR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Bank of America CD (6/2025) [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Bristol-Myers Squibb Company Common Stock		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(BMY) [ST]					
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Charles Schwab (2024) [BA]		\$50,001 - \$100,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Citibank (6/2025) [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ FHLB (3/2030) [GS]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ FHLB (9/2026) [GS]		\$50,001 - \$100,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ SOFI (2024) [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ SWVXX [BA]		\$100,001 - \$250,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Invesco Water Resources ETF (PHO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ NovoCure Limited - Ordinary Shares (NVCR) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab SEP IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$15,001 - \$50,000	Interest	Not Applicable	\$201 - \$1,000
Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ SWVXX [BA]		\$1,001 - \$15,000	Interest	Not Applicable	\$1 - \$200
Spouse Schwab IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Snowflake Inc. Class A Common Stock (SNOW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Spouse Schwab IRA ⇒ SWVXX [BA]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Arm Holdings plc - American Depositary Shares (ARM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Fidelity Select Utilities Growth Portfolio (FSUTX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Sprott Physical Gold Trust ETV (PHYS) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
TreasuryDirect ⇒ Series I Savings Bond [GS]		\$15,001 - \$50,000	Interest	Not Applicable	\$1,001 - \$2,500
TreasuryDirect ⇒ Series I Savings Bonds [GS]		\$15,001 - \$50,000	Interest	Not Applicable	None
DESCRIPTION: Jessica's I-Bonds (amount TBD)					

\* 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
Westly Foundation	spouse salary	N/A	\$110,000.00

**SCHEDULE D: LIABILITIES**

None disclosed.

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

**SCHEDULE A INVESTMENT VEHICLE DETAILS**

<ul style="list-style-type: none"><li>◦ Schwab LOCATION: US</li><li>◦ Spouse Schwab IRA (Owner: SP)</li><li>◦ CalPERS Pension Sam Liccardo DESCRIPTION: Defined Benefit Pension for service at the City of San Jose; 16 years accrual</li><li>◦ Spouse Schwab SEP IRA (Owner: SP)</li><li>◦ Spouse Schwab Roth IRA (Owner: SP)</li><li>◦ TreasuryDirect LOCATION: US</li><li>◦ Schwab ⇒ Schwab IRA -- Sam Liccardo</li><li>◦ Schwab ⇒ Schwab Roth IRA -- Sam Liccardo</li><li>◦ Schwab ⇒ Schwab Trading Account -- Sam Liccardo</li><li>◦ Schwab ⇒ Schwab SEP IRA -- Sam Liccardo</li></ul>
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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:** Hon. Sam T. Liccardo , 05/09/2025