



Filing ID #10007471

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Lucille Roybal-Allard  
**Status:** Member  
**State/District:** CA40

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2014  
**Filing Date:** 05/15/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
California State Retirement Plan		Undetermined	Pension Payment	\$1,001 - \$2,500	<input type="checkbox"/>
Congressional FCU (Checking and Savings)	SP	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Congressional Federal Credit Union (Checking, Savings, MM)		\$500,001 - \$1,000,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Defined Benefit Plan ⇒ Mutual of America Roybal Foundation Retirement Fund	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Defined Benefit Plan ⇒ Prudential Hill Retirement Funds) Part A-Equity Income	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Defined Benefit Plan ⇒ Prudential Hill Retirement Funds) Part B-Oppenheimer Group	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Navy Federal Credit Union	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
United Way of America	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
United Way of America LA	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>

\* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
California State Retirement	Legislative Pension	\$2,400

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	American Express	2014	Revolving Account	\$15,001 - \$50,000
JT	Pentagon Federal Credit Union	2012	Mortgage on personal residence Washington DC	\$250,001 - \$500,000
JT	Wells Fargo	1998	Mortgage on Personal Residence Los Angeles, CA	\$250,001 - \$500,000
JT	Chase	November 2011	Mortgage on Personal Residence Downey, CA	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
1992	Myself and the State of California	Continued participation in pension plan

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

- Defined Benefit Plan (Owner: SP)  
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. Lucille Roybal-Allard , 05/15/2015