



Filing ID #10016610

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Theodore E. Deutch  
**Status:** Member  
**State/District:** FL22

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2016  
**Filing Date:** 06/14/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AQR Managed Futures		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Blackrock Strategic Income		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DFA Emerging Markets Core		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DFA Int'l Core Equity		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DFA Int'l Small Company		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DFA US Small Cap Value		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Dodge & Cox Income Fund		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Flexshares 5 Year Target		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Florida Prepaid College	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: FL					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Goldman Sachs MLP Energy		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IShares MSCI USA Min Vol		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JP Morgan Strategic Income		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPMorgan Chase Structured Note	JT	\$1,001 - \$15,000	Interest	None	<input checked="" type="checkbox"/>
DESCRIPTION: This is a structured note that is part bond and part option with a fixed maturity date of January 2018.					
Lincoln Financial VU Life ⇒ AFIS Growth		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial VU Life ⇒ AFIS International		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial VU Life ⇒ LN Special Opportunities		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Structured Note		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: This is a structured note that is part bond and part option with a fixed maturity date of January 2018.					
Powershares S&P 500 High Quality	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Powershares S&P 500 Low Vol		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Pure Beta Broad Commodity		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Pure Beta Broad Commodity	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Russell 3000 Index ETF	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Russell 3000 Index ETF	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
S&P 400 Mid Value Index	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
S&P 400 Midvalue Index		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Bank Deposit	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab Bank Deposit	DC	\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Schwab Bank Deposit	DC	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab Bank Deposit	SP	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Schwab Bank Deposit	DC	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Schwab Bank Deposit		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Schwab US Broad Market		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Stone Ridge High Yield Reinsurance Risk Fund		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Stoneridge Alt Lend		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
T. Rowe Price Summit Municipal	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
T. Rowe Price Summit Municipal	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
T. Rowe Price Summit Municipal	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Thornburg Ltd Term Income		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Thornburg Ltd Term Muni Income	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Conservative Growth		\$15,001 - \$50,000	None		<input type="checkbox"/>
Vanguard Income (Moderate)		\$100,001 - \$250,000	None		<input type="checkbox"/>
Vanguard Ltd Term Tax Exempt	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard Mega Cap 300		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard REIT		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Accounts		\$1,001 - \$15,000	None		<input type="checkbox"/>

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

## SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
AQR Managed Futures		07/15/2016	P	\$1,001 - \$15,000	
ASG Global Alternatives		06/21/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Blackrock Strategic Income		07/15/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DFA Emerging Markets		03/28/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DFA International Core Equity		07/15/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DFA International Core Equity		03/28/2016	P	\$1,001 - \$15,000	
Dodge & Cox Income		07/15/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
FlexShares 5 Year Target		07/15/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Goldman Sachs MLP Energy		07/15/2016	P	\$1,001 - \$15,000	
Goldman Sachs Strategic Income		07/15/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Enhanced US Large	JT	06/21/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
JP Morgan Chase Structured Note	JT	06/24/2016	P	\$1,001 - \$15,000	
DESCRIPTION: Structured note that is part bond and part option with fixed maturity date of January, 2018.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JP Morgan Strategic Income		07/15/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Structured Note		06/24/2016	P	\$1,001 - \$15,000	
Powershares S&P 500 High Quality	JT	07/15/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Pure Beta Broad Commodity	SP	07/15/2016	P	\$15,001 - \$50,000	
Pure Beta Broad Commodity		07/15/2016	P	\$1,001 - \$15,000	
Russell 3000 Index		07/15/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Russell 3000 Index	SP	04/7/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
S&P 400 Mid Value	SP	07/15/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Stone Ridge Reinsurance Risk Fund DESCRIPTION: Closed-end publicly traded fund		12/2/2016	E	\$1,001 - \$15,000	
Stoneridge Alt Lending		07/22/2016	P	\$1,001 - \$15,000	
T Rowe Price Summit Municipal	JT	07/15/2016	P	\$1,001 - \$15,000	
Vanguard Mega Cap 300		07/15/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard REIT		07/15/2016	P	\$1,001 - \$15,000	

## SCHEDULE C: EARNED INCOME

Source	Type	Amount
Hillel of Broward and Palm Beach, Boca Raton, FL	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo	September 2011	Mortgage on 12373 Cascades Pointe Drive, Boca Raton, Florida	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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?
The Aspen Institute	03/28/2016	04/4/2016	Fort Lauderdale - Beijing - Nanjing - Fort Lauderdale	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
U.S. Association of Former Members of Congress	03/3/2016	03/6/2016	Boca Raton - Boca Raton - Boca Raton	0	<input 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 ASSET CLASS DETAILS

<ul style="list-style-type: none"> <li>Lincoln Financial VU Life</li> </ul>
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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. Theodore E. Deutch , 06/14/2017