

# FINANCIAL DISCLOSURE REPORT

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#### FILER INFORMATION

Name: Hon. Pete Aguilar

Status: Member State/District: CA31

### FILING INFORMATION

Filing Type: Annual Report

Filing Year: 2016

**Filing Date:** 05/2/2017

# SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AAA Universal Life Insurance		\$1,001 - \$15,000	Tax-Deferred		
Alta Vista Credit Union	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	
Congressional Federal Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	
TIAA CREF ⇒ CREF Social Choice - CREF 4641615-2 ⇒ TIAA CREF Retirement  DESCRIPTION: Spouse 401k	SP	\$1,001 - \$15,000	Tax-Deferred		
TIAA CREF ⇒ CREF Social Choice - CREF M721221-2 ⇒ TIAA CREF Retirement  DESCRIPTION: Spouse 401k	SP	\$1,001 - \$15,000	Tax-Deferred		П
TIAA CREF ⇒ TC Lifecycle 2045-PREM ⇒ TIAA CREF Retirement  DESCRIPTION: Spouse 401k	SP	\$15,001 - \$50,000	Tax-Deferred		
TIAA CREF $\Rightarrow$ TIAA Traditional - TIAA L721221-4 $\Rightarrow$ TIAA CREF Retirement  Description: Spouse 401k	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA CREF ⇒ TIAA Traditional 3641615-4 ⇒ TIAA CREF Retirement	SP	\$1,001 - \$15,000	Tax-Deferred		П
Description: Spouse 401k					

<sup>\*</sup> Asset class details available at the bottom of this form.

### SCHEDULE B: TRANSACTIONS

None disclosed.

### SCHEDULE C: EARNED INCOME

Source	Туре	Amount
University of Redlands	Spouse Salary	N/A

# SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Туре	Amount of Liability
JT	PCC Mortgage	October 2012	Mortgage on primary residence	\$250,001 - \$500,000
	COMMENTS: Refinanced/Paid off October 20	016		
JT	United Wholesale Mortgage	October 2016	Mortgage on Primary residence	\$250,001 - \$500,000

### **SCHEDULE E: POSITIONS**

Position	Name of Organization
Uncompensated Bord Member	YMCA of the East Valley

# SCHEDULE F: AGREEMENTS

None disclosed.

### 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

• TIAA CREF (Owner: SP)

Description: Spouse 401K

• TIAA CREF ⇒ CREF Social Choice - CREF 4641615-2 (Owner: SP)

Description: Spouse 401k

• TIAA CREF ⇒ CREF Social Choice - CREF M721221-2 (Owner: SP)

Description: Spouse 401k

o TIAA CREF ⇒ TC Lifecycle 2045-PREM (Owner: SP)

Description: Spouse 401k

• TIAA CREF ⇒ TIAA Traditional - TIAA L721221-4 (Owner: SP)

Description: Spouse 401k

• TIAA CREF ⇒ TIAA Traditional 3641615-4 (Owner: SP)

Description: Spouse 401k

### 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. Pete Aguilar, 05/2/2017