



Filing ID #10026400

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Pramila Jayapal  
**Status:** Member  
**State/District:** WA07

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2017  
**Filing Date:** 05/9/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Am Funds EuroPac Gr R6 [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares in 2017					
Blackrock US Small Cap Value Equity Index [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares in 2017.					
Cabin [RP]	JT	\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Joseph, OR, US DESCRIPTION: Rental income from personal cabin.					
DFA Emerging Markets Core Equity [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DFA Tax Managed US Core 2 [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DFA Tax Managed US Market Wide Value [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DFA Tax Managed US Targeted Value [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Inspirus Credit Union [BA]	JT	\$250,001 - \$500,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
IRA ⇒ DFA Emerging Markets Core Equity [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA Emerging Markets Core Equity [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ DFA Emerging Markets Small [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA Global Real Estate [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ DFA International Core Equity [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ DFA International Core Equity [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA International Real Estate [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA International Small Cap Value [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA International Small Company [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA International Value [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ DFA International Value [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ DFA Investment Grade Bond Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ DFA One-Year Fixed [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA ⇒ DFA One-Year Fixed [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA Tax Managed US Core 2 [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ DFA Two-Year Global [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA US Core Equity 2 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA US Large Cap Value [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA US Small Cap [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA US Small Cap Value [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA US Small Cap Value [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Schwab Government Money Fund [MF] DESCRIPTION: SEP IRA		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Schwab Money Market Fund [OT] DESCRIPTION: Money Market Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Schwab Money Market Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Vanguard GNMA [MF] DESCRIPTION: SEP IRA		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Vanguard GNMA [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Vanguard REIT Index [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Newell Rubbermaid Inc. (NWL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Roth IRA ⇒ DFA Emerging Markets [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares in 2017.					
Roth IRA ⇒ DFA Emerging Markets Social Core Equity [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Roth IRA ⇒ DFA Emerging Markets Social Core Equity [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Roth IRA ⇒ DFA Emerging Markets Value [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares in 2017.					
Roth IRA ⇒ DFA International Small Cap Value [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares in 2017.					
Roth IRA ⇒ DFA International Small Cap Value [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares 2017.					
Roth IRA ⇒ DFA International Value [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares in 2017.					
Schwab Money Market Fund [MF]		\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Sound Retirement Trust Pension [PE]	SP	Undetermined	Pension	\$5,001 - \$15,000	<input type="checkbox"/>
Teamsters Affiliates Pension [PE]	SP	Undetermined	None		<input type="checkbox"/>
Teamsters Pension [PE]	SP	Undetermined	None		<input type="checkbox"/>
UFCW Pension [PE]	SP	Undetermined	Pension	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard 500 Index Admiral [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares in 2017.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard REIT Index [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

\* Asset class 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?
Am Funds EuroPac Gr R6 [MF]		01/31/2017	P	\$1,001 - \$15,000	
Am Funds EuroPac Gr R6 [MF]		04/1/2017	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Sale of all shares.					
Blackrock US Small Cap Value Equity Index [MF]		03/10/2017	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of all shares.					
DFA Emerging Markets [MF]		12/18/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Sold all shares.					
DFA Emerging Markets Core Equity [MF]		06/20/2017	P	\$1,001 - \$15,000	
DFA Emerging Markets Core Equity [MF]		10/11/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DFA Emerging Markets Social Core Equity [MF]		12/19/2017	P	\$15,001 - \$50,000	
DFA Emerging Markets Social Core Equity [MF]		12/19/2017	P	\$15,001 - \$50,000	
DFA Emerging Markets Value [MF]		12/18/2017	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sold all shares.					
DFA Global Real Estate [MF]		08/16/2017	P	\$1,001 - \$15,000	
DFA International Core Equity [MF]		06/20/2017	P	\$50,001 - \$100,000	
DFA International Small Cap Value [MF]		04/24/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DFA International Small Cap Value [MF]		12/18/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
DFA International Small Cap Value [MF]		12/18/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
DFA International Small Cap Value [MF]		04/24/2017	P	\$1,001 - \$15,000	
DFA International Value [MF]		06/20/2017	P	\$15,001 - \$50,000	
DFA International Value [MF]		12/18/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
DFA Investment Grade Bond Fund [MF]		03/28/2017	P	\$15,001 - \$50,000	
DFA Tax Managed US Core 2 [MF]		06/20/2017	P	\$100,001 - \$250,000	
DFA Tax Managed US Core 2 [MF]		07/11/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DFA Tax Managed US Market Wide Value [MF]		04/11/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DFA Tax Managed US Targeted Value [MF]		04/5/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DFA US Small Cap Value [MF]		06/20/2017	P	\$15,001 - \$50,000	
Vanguard 500 Index Admiral [MF]		01/31/2017	P	\$1,001 - \$15,000	
Vanguard 500 Index Admiral [MF]		04/1/2017	S	\$100,001 - \$250,000	<input type="checkbox"/>
DESCRIPTION: Sale of all shares.					

\* Asset class 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
Spouse's Self-Employed Consulting business	Spouse's consulting work.	\$8,316.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	SunTrust Mortgage	September 2012	Home Mortgage	\$250,001 - \$500,000
JT	Wells Fargo Bank, N.A.	05/31/2017	Residential Mortgage	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Creative Advisory Board Member	Hedgebrook
Board Member	Progressive Caucus Center (Nonprofit Organization)

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

<ul style="list-style-type: none"><li>◦ IRA</li><li>◦ IRA (Owner: SP)</li><li>◦ Roth IRA</li><li>◦ Roth IRA (Owner: SP)</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

☐ 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. Pramila Jayapal , 05/9/2019