



Filing ID #10028444

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Peggy Huang
Status: Congressional Candidate
State/District: CA45

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 07/2/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jackie UTMA ⇒ AGG [EF]	DC	\$1 - \$1,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Jackie UTMA ⇒ AGZ [EF]	DC	\$1 - \$1,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Jackie UTMA ⇒ BREIT [RE]	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest, Rent	\$1 - \$200	\$1 - \$200
Jackie UTMA ⇒ BXMIX [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Jackie UTMA ⇒ ECON [EF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Jackie UTMA ⇒ FLOT [EF]	DC	\$1 - \$1,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Jackie UTMA ⇒ IJJ [EF]	DC	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jackie UTMA ⇒ MHIEX [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Jackie UTMA ⇒ QIWSQ [MF]	DC	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Jackie UTMA ⇒ SHY [EF]	DC	\$1 - \$1,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Jackie UTMA ⇒ Tiffany & Co. (TIF) [ST]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
James & Peggy Joint ⇒ QIWSQ [MF]	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
James IRA ⇒ AFRYX [MF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$201 - \$1,000	\$201 - \$1,000
James IRA ⇒ BXMIX [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
James IRA ⇒ FDRXX [MF]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
James IRA ⇒ FTSM [EF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
James IRA ⇒ HIEMX [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
James IRA ⇒ IICIX [MF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
James IRA ⇒ LEINX [MF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
James IRA ⇒ MHIEX [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
James Roth ⇒ AGG [EF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
James Roth ⇒ AGZ [EF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
James Roth ⇒ BXMIX [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
James Roth ⇒ ECON [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
James Roth ⇒ FDRXX [MF]	SP	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
James Roth ⇒ FLOT [EF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
James Roth ⇒ IJJ [EF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
James Roth ⇒ MHIEX [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
James Roth ⇒ SHY [EF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Josie UTMA ⇒ AGG [EF]	DC	\$1 - \$1,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Josie UTMA ⇒ AGZ [EF]	DC	\$1 - \$1,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Josie UTMA ⇒ BREIT [RE]	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest, Rent	\$1 - \$200	\$1 - \$200
Josie UTMA ⇒ BXMIX [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Josie UTMA ⇒ ECON [EF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Josie UTMA ⇒ Exxon Mobil Corporation (XOM) [ST]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Josie UTMA ⇒ FLOT [EF]	DC	\$1 - \$1,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Josie UTMA ⇒ IJJ [EF]	DC	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Josie UTMA ⇒ MHIEX [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Josie UTMA ⇒ QIWSQ [MF]	DC	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Josie UTMA ⇒ SHY [EF]	DC	\$1 - \$1,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Peggy Roth ⇒ AGG [EF]		\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Peggy Roth ⇒ AGZ [EF]		\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Peggy Roth ⇒ BXMIX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Peggy Roth ⇒ ECON [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Peggy Roth ⇒ FDRXX [MF]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Peggy Roth ⇒ FLOT [EF]		\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
Peggy Roth ⇒ IJJ [EF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Peggy Roth ⇒ MHIEX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Peggy Roth ⇒ SHY [EF]		\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PegJam Trust ⇒ Apple Inc. (AAPL) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ BGRIX [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
PegJam Trust ⇒ BREIT [RE]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest, Rent	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ BXMIX [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ CEMFX [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ Cisco Systems, Inc. (CSCO) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ DXJ [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ Exxon Mobil Corporation (XOM) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ FPE [EF]	JT	\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ GlaxoSmithKline PLC (GSK) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ HIEMX [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ Invesco Ltd (IVZ) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ Johnson & Johnson (JNJ) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PegJam Trust ⇒ JPMorgan Chase Capital XVI JP Morgan Alerian MLP ETN (AMJ) [ET]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ MetLife, Inc. (MET) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ MHIEX [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
PegJam Trust ⇒ Procter & Gamble Company (PG) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ The Blackstone Group L.P. Common Units Representing Limited Partnership Interests (BX) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ Verizon Communications Inc. (VZ) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PegJam Trust ⇒ Walmart Inc. (WMT) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

* 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 Current Year to Filing	Amount Preceding Year
State of California	Salary	\$125,000.00	\$105,498.00
James Huang, D.O., Inc.	Spouse Salary	N/A	N/A
Orange County Mosquito and Vector Control District	Stipend	\$300.00	\$900.00
Foothill Eastern Transportation Corridor Agency	Stipend	\$1,680.00	\$3,120.00
Southern California Association of Government	Stipend	\$1,200.00	\$2,040.00
County of Orange	Stipend	\$63.78	\$400.00
City of Yorba Linda	Stipend	\$2,000.00	\$6,660.00

Source	Type	Amount Current Year to Filing	Amount Preceding Year

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Navient	August 1994	Student Loan	\$15,001 - \$50,000
JT	Bayview	August 2018	Mortgage on rental property, Irvine, CA	\$100,001 - \$250,000
JT	Lakeview	September 2018	Mortgage on rental property,Tempe, AZ	\$100,001 - \$250,000
JT	Sierra Pacific	January 2019	Mortgage on rental property in Gilbert, AZ	\$50,001 - \$100,000
JT	Chase	May 2019	credit card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	P3J Holding, LLC
President of the Board of Director	Lifesteps Children and Families Services, Inc.
member	St. Joseph Venture, LLC
Member	Waterford, LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> Jackie UTMA (Owner: DC) LOCATION: US James & Peggy Joint (Owner: JT) LOCATION: US James IRA (Owner: SP) James Roth (Owner: SP)

- Josie UTMA (Owner: DC)
LOCATION: US
- Peggy Roth
- PegJam Trust (Owner: JT)

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: Peggy Huang , 07/2/2019