



Filing ID #10023276

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Mark Takano
Status: Member
State/District: CA41

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2017
Filing Date: 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alliant Credit Union [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Altura Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
California Public Retirement System [DB]		Undetermined	None		<input type="checkbox"/>
California State Teacher Retirement System [DB]		Undetermined	None		<input type="checkbox"/>
Congressional Federal Credit Union [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
My 403b ⇒ Mainstay VP Moderate Allocation Fund [MF]		\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Tax Deferred					
New York Life Whole Life Policy [WU]		\$1,001 - \$15,000	None		<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

None disclosed.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Sofi	December 2016	Refinance of Student Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	U.S. - Japan Foundation
Board Member	Coders for Progress
Board Member	Dollars for Scholars

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
September 1987	Self and the California State Teacher Retirement System	Continued Participation in retirement plan of prior employer
December 2017	Self and the California Public Employee Retirement System	Continued Participation in retirement plan of prior employer
November 2012	Self, the Rialto Education Association, and the Rialto Unified School District	Unpaid leave of absence until end of Congressional Service

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?
Global Atlanticists	04/16/2017	04/22/2017	Washington, DC - Hamburg, Germany - London, England - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Center for Democracy in America	10/14/2017	10/17/2017	Washington, DC - Miami, FL - Los Angeles, CA	0	<input checked="" 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

<div> <div>o</div> <div>My 403b</div> <div>DESCRIPTION: New York Life Variable Annuity: Mainstay Moderate Allocation</div> </div>

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. Mark Takano , 05/15/2018