



Filing ID #10020796

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Judy Chu
Status: Member
State/District: CA27

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?
Athene Annuity and Life Company Fixed Annuity [FN]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
California Public Employees Retirement System [DB]		Undetermined	defined benefit	\$15,001 - \$50,000	<input type="checkbox"/>
California State Teachers Retirement System [DB]		Undetermined	defined benefit	\$15,001 - \$50,000	<input type="checkbox"/>
Chase Bank Certificate of Deposit [BA]	SP	\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
Chu-Lim Investments LLC ⇒ Rental Property #1, 25% [RP]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Santa Clara, CA, US DESCRIPTION: Inherited from parents estate, under Judy M. Chu Trust & J.M. Chu Irrevocable Trust II					
Chu-Lim Investments LLC ⇒ Rental Property #2, 25% [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Santa Clara, CA, US DESCRIPTION: Inherited from parents' estate, under Judy M. Chu Trust & J.M. Chu Irrevocable Trust II					
Chu-Lim Investments LLC ⇒		\$500,001 -	Rent	\$15,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rental Property #3, 25% [RP]		\$1,000,000		\$50,000	
LOCATION: Santa Clara, CA, US DESCRIPTION: Inherited from parents' estate, under Judy M. Chu Trust & J.M. Chu Irrevocable Trust II					
Chu-Lim Investments LLC ⇒ Rental Property #4, 25% [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Santa Clara, CA, US DESCRIPTION: Inherited from parents' estate, under Judy M. Chu Trust & J.M. Chu Irrevocable Trust II					
Chu-Lim Investments LLC ⇒ Rental Property #5, 25% [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: San Jose, CA, US DESCRIPTION: Inherited from parents' estate, under Judy M. Chu Trust & J.M. Chu Irrevocable Trust II					
Citibank Savings Acct [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Citibank IRA--Day to Day Savings Acct [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Citibank- J.M. Chu Irrevocable Trust II [BA]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited from parents estate.					
East West Bank Certificate of Deposit [BA]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Charitable Account- Judy Chu Fund [OT]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited from parents' estate.					
Law Offices of Eng & Nishimura [OT]	SP	\$250,001 - \$500,000	Partnership income	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Partnership income. Located in Los Angeles, CA.					
Lincoln Financial Group ⇒ 403B- Delaware VIP REIT [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial Group ⇒ 403B--Delaware VIP Diversified Income [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial Group ⇒ Annuity Amer Legacy US--Fixed [FN]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial Group ⇒ Annuity Amer Legacy US--Large Blend-Growth Income Fund [OT]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Variable Annuity					
LSW-Life Insurance Co of the Southwest 403B [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
New Omni Bank Certificate of Deposit [BA]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Preferred Bank Certificate of Deposit [BA]	SP	\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Savings Plus ⇒ 401K International Fund [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Large Cap Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Large Cap Index Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Large Cap Socially Responsible Fund [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Mid Cap Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Short Term Investment Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Short Term Investment Fund- Cash [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Small Cap Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 International Fund [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Large Cap Socially Responsible Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Large Cap Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
457 Large Cap Index Fund [PE]					
Savings Plus ⇒ 457 Mid Cap Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Short Term Investment Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Short Term Investment Fund- Cash [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Small Cap Fund [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE FEB 17 2017 106 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE FEB 24 2017 105.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE FEB 3 2017 105.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE JAN 27 2017 105.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE JAN 27 2017 105.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE JUL 14 2017 108.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE JUN 16 2017 107 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE JUN 16 2017 108 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TD Ameritrade Investment Account ⇒ FXE JUN 23 2017 107 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE JUN 23 2017 108 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE JUN 9 2017 107 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE MAR 10 2017 104 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE MAR 17 2017 104.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE MAR 3 2017 104.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE MAY 26 2017 106.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD APR 21 2017 123 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD APR 28 2017 125 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD APR 7 2017 122 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD AUG 11 2017 117 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TD Ameritrade Investment Account ⇒ GLD AUG 18 2017 119 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD AUG 25 2017 119.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD AUG 4 2017 115.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD AUG 4 2017 120 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD DEC 1 2017 122 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD DEC 1 2017 122 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD DEC 1 2017 122 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD FEB 10 2017 110.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD FEB 17 2017 112 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD FEB 17 2017 119 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD FEB 24 2017 113.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD FEB 3 2017 110 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ GLD JAN 27 2017 113 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ GLD JAN 27 2017 114 CALL [OT]		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ GLD JUL 21 2017 115 PUT [OT]		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ GLD JUL 28 2017 115 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ GLD JUN 16 2017 125 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ GLD JUN 2 2017 122.5 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ GLD JUN 23 2017 124.5 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ GLD JUN 9 2017 124 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ GLD JUN 9 2017 188 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ GLD MAR 10 2017 121 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ GLD MAR 17 2017 121 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TD Ameritrade Investment Account ⇒ GLD MAR 24 2017 119 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD MAR 3 2017 115 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD MAR 3 2017 121 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD MAY 12 2017 124 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD MAY 26 2017 117 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD NOV 17 2017 122.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD NOV 17 2017 122.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD NOV 3 2017 123 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD OCT 20 2017 123.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD OCT 20 2017 123.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD OCT 6 2017 122.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
GLD SEP 1 2017 120 PUT [OT]					
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ GLD SEP 15 122.5 PUT [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ GLD SEP 15 2017 126.5 CALL [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ GLD SEP 22 2017 122 CALL [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ GLD SEP 8 2017 120 PUT [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ GLD SEP 8 2017 121 PUT [OT]	None		Capital Gains	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPX JUL 21 2017 1900 PUT [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPX JUN 16 2017 1875 PUT [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPX MAY 1900 PUT [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPX NOV 17 2017 1975 PUT [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPX NOV 17 2017 1975 PUT [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPX OCT 20 2017 1950 PUT [OT]	None		Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPX SEP 15 2017 2025 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW APR 13 2017 1875 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW APR 28 2017 1875 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW AUG 18 2017 1950 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW AUG 31 2017 1950 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW DEC 11 2017 2500 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW DEC 15 2017 2050 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW DEC 15 2017 2050 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW DEC 15 2017 2450 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW DEC 15 2017 2450 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW DEC 15 2017 2450 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TD Ameritrade Investment Account ⇒ SPXW DEC 15 2017 2500 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW DEC 18 2017 2500 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW DEC 18 2017 2500 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW DEC 29 2017 2100 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW DEC 4 2017 2450 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW DEC 6 2017 2450 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW DEC 8 2017 2450 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW DEC 8 2017 2450 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW DEC 8 2017 2480 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW FEB 16 2018 2100 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JAN 10 2018 2450 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SPXW JAN 12 2018 2100 PUT [OT] DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW JAN 12 2018 2100 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JAN 12 2018 2435 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JAN 12 2018 2450 PUT [OT] DESCRIPTION: PUT		\$1,001 - \$15,000	Capital Gains	None	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JAN 12 2018 2450 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JAN 12 2018 2450 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JAN 31 2018 2100 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JAN 31 2018 2650 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JAN 31 2018 2650 CALL [OT] DESCRIPTION: CALL		\$1,001 - \$15,000	Capital Gains	None	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JAN 5 2018 2450 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JUL 31 2017 2025 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW JUN 29 2018 2700 CALL [OT]		\$1,001 - \$15,000	Capital Gains	None	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ SPXW JUN 30 2017 1900 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW MAR 10 2017 1875 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW MAR 31 2017 1875 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW MAY 31 2017 1875 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW NOV 1 2017 2435 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW NOV 10 2017 2450 [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW NOV 13 2017 2450 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW NOV 15 2017 2450 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW NOV 15 2017 2450 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW NOV 17 2017 2450 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ SPXW NOV 3 2017 2435 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TD Ameritrade Investment Account ⇒ SPXW NOV 30 2017 1975 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW NOV 30 2017 1975 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW NOV 6 2017 2435 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW NOV 8 2017 2435 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW OCT 13 2017 2400 PUT [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW OCT 18 2017 2425 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW OCT 20 2017 2425 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW OCT 23 2017 2425 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW OCT 31 2017 1925 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW OCT 31 2017 1925 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPXW OCT 6 2017 2400 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SPXW SEP 29 2017 2000 PUT [OT] DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ TLT APR 28 2017 126 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT APR 7 2017 122 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT AUG 11 2017 126.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT AUG 18 2017 127.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT AUG 25 2017 121.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT AUG 25 2017 127.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT AUG 25 2017 129 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT AUG 4 2017 126.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT DEC 1 2017 128 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT DEC 1 2017 128.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT DEC 15 2017 129 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT DEC 15 2017 129.5 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT DEC 22 2017 129 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT DEC 22 2017 130 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT DEC 29 2017 130 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT DEC 8 2017 128 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT FEB 10 2017 123 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT FEB 17 2017 116.5 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ TLT FEB 17 2017 123 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT FEB 24 2017 123 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT FEB 3 2017 118 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ TLT FEB 3 2017 122 CALL [OT]		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: CALL					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TD Ameritrade Investment Account ⇒ TLT JAN 20 2017 118 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JAN 20 2017 121 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JAN 27 2017 123 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JUL 14 2017 127.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JUL 21 2017 124.5 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JUL 21 2017 128 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JUL 28 2017 126 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JUL 28 2017 126.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JUL 7 2017 126 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JUN 16 2017 128 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JUN 2 2017 126 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TLT JUN 30 2017 128.5 CALL [OT] DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT MAR 10 2017 124 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT MAR 17 2017 123 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT MAR 24 2017 123 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT MAR 3 2017 123 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT MAY 12 2017 126.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT MAY 19 2017 124.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT MAY 5 2017 125.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT NOV 10 2017 121 PUT [OT] DESCRIPTION: PUT		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT NOV 17 2017 128 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT NOV 17 2017 128 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT NOV 24 2017 122 PUT [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ TLT NOV 24 2017 127.5 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT NOV 3 2017 128.5 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT OCT 13 2017 130 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT OCT 20 2017 128 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT OCT 27 2017 127.5 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT OCT 27 2017 128.5 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT OCT 6 2017 129 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT OCT 6 2017 129 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT SEP 1 2017 130 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT SEP 15 2017 129.5 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ TLT SEP 15 2017 130 CALL [OT]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: CALL					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TD Ameritrade Investment Account ⇒ TLT SEP 22 2017 132 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT SEP 22 2017 133 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT SEP 29 2017 131 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT SEP 8 2017 129.5 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT SEP 8 2017 130 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ UVXY APR 21 2017 32 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ UVXY AUG 11 2017 44 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ UVXY AUG 4 2017 44 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ UVXY FEB 10 2017 36 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ UVXY FEB 24 2017 31 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ UVXY FEB 3 2017 37 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
UVXY MAR 10 2017 31 CALL [OT] DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ UVXY MAR 24 2017 32 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ UVXY MAR 3 2017 32 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ UVXY MAR 31 2017 31 CALL [OT] DESCRIPTION: CALL		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
United Pacific Bank Certificate of Deposit [BA]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Investment Account ⇒ CA Intermediate Term Bond Tax-Exempt Mutual Fund VCADX [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Mid-Cap Index Fund VIMAX [MF]		\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Windsor II Mutual Fund VWNAX [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ American Funds Capital Income Builder Fund (CAIFX) [MF] DESCRIPTION: Inherited through parents estate.		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ American Funds Capital World Growth and Income Fund (WGIFX) [MF] DESCRIPTION: Inherited through parents estate.		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ cash [OT] DESCRIPTION: Inherited through parents estate.		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Fidelity 500 Index Fund (FXSIX) [MF] DESCRIPTION: Inherited through parents estate.		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ IQ Hedge Multi-Strategy Tracker (QAI) [EF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares MSCI EAFE Index Fund (EFA) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Growth Index (IWF) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Value Index (IWD) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 2000 Index (IWM) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Schwab Fundamental International Large Company Index Fund (SFNNX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR Dow Jones Global Real Estate (RWO) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR S&P MidCap 400 (MDY) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ T. Rowe Price Dividend Growth Fund (PRDGX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Vanguard Dividend Appreciation Index Fund (VDADX) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Inherited through parents estate.					
Wells Fargo Advisors-Stocks ⇒ Allstate Corporation (ALL) [ST]		\$100,001 - \$250,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Wells Fargo Advisors-Stocks ⇒		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Airlines Group, Inc. (AAL) [ST]					
Wells Fargo Advisors-Stocks ⇒ Cash [OT]		\$1,001 - \$15,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Cash reserve					
Wells Fargo Advisors-Stocks ⇒ Discover Financial Services (DFS) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo Advisors-Stocks ⇒ International Business Machines Corporation (IBM) [ST]		\$50,001 - \$100,000	Dividends	None	<input type="checkbox"/>
Wells Fargo Advisors-Stocks ⇒ Lands' End, Inc. (LE) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo Advisors-Stocks ⇒ Morgan Stanley (MS) [ST]		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Bank Checking Account [BA]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Zurich Advantage III ⇒ 403B--Balanced- DWS Global Income Builder VIP [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Zurich Advantage III ⇒ 403B--Large Cap U.S. Stock-DWS Cap Growth VA [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Zurich Advantage III ⇒ 403B--Misc. Fixed-DWS High Income VIP [PE]		\$1,001 - \$15,000	Tax-Deferred		<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?
TD Ameritrade Investment Account ⇒ 300 GOLD TR GOLD SHS [OT]		06/7/2017	P	\$15,001 - \$50,000	
LOCATION: US DESCRIPTION: CLOSE ASSIGNMENT					
TD Ameritrade Investment Account ⇒		06/1/2017	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
300 SH GOLD TR GOLD SHS ETF [OT] LOCATION: US DESCRIPTION: ASSIGNMENT					
TD Ameritrade Investment Account ⇒ EURO TRUST FXE JUN 2 107.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		06/1/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ EURO TRUST FXE JUN 23 108 CALL [OT] LOCATION: US DESCRIPTION: CALL		06/7/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ EURO TRUST FXE JUN 9 107.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		06/8/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ EURO TRUST FXE MAY 5 2017 105 CALL [OT] LOCATION: US DESCRIPTION: CALL		04/20/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ FXE JUL 14 108.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		06/30/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ FXE JUL 14 108.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		07/13/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ FXE JUL 7 108.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		07/7/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ FXE JUN 30 108.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		06/30/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒		05/23/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
FXE JUN 9 107.5 CALL [OT] LOCATION: US DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ FXE MAY 26 106.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		05/23/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ GLD AUG 17 120 CALL [OT] LOCATION: US DESCRIPTION: CALL		08/10/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ GLD AUG 25 120.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		08/10/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD AUG 25 120.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		08/23/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ GLD AUG 4 120 CALL [OT] LOCATION: US DESCRIPTION: CALL		07/21/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD JAN 114 CALL [OT] LOCATION: US DESCRIPTION: CALL		01/12/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ GLD JAN 27 114 CALL [OT] LOCATION: US DESCRIPTION: CALL		01/12/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD JAN 27 114 PUT [OT] LOCATION: US DESCRIPTION: PUT		01/26/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒		07/7/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
GLD JUL 21 115 PUT [OT] LOCATION: US DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ GLD JUL 21 118.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		07/21/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ GLD JUL 28 119 CALL [OT] LOCATION: US DESCRIPTION: CALL		07/27/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ GLD NOV 3 123 PUT [OT] LOCATION: US DESCRIPTION: PUT		10/18/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD OCT 20 123.5 PUT [OT] LOCATION: US DESCRIPTION: PUT		10/4/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD OCT 20 123.5 PUT [OT] LOCATION: US DESCRIPTION: PUT		10/18/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ GLD OCT 6 122.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		09/21/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD OCT 6 124 PUT [OT] LOCATION: US DESCRIPTION: CALL		09/21/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD OCT 6 124 PUT [OT] LOCATION: US DESCRIPTION: PUT		10/4/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒		09/1/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
GLD SEP 1 125 CALL [OT] LOCATION: US DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ GLD SEP 15 126.5 call [OT] LOCATION: US DESCRIPTION: CALL		09/1/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD SEP 22 122 CALL [OT] LOCATION: US DESCRIPTION: CALL		09/6/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD SEP 22 122 CALL [OT] LOCATION: US DESCRIPTION: CALL		09/21/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ GLD SEP 22 125 PUT [OT] LOCATION: US DESCRIPTION: PUT		09/21/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ GLD SEP 8 121 CALL [OT] LOCATION: US DESCRIPTION: CALL		08/23/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ GLD SEP 8 121 CALL [OT] LOCATION: US DESCRIPTION: CALL		09/6/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ S&P 500 2435 PUT [OT] LOCATION: US DESCRIPTION: PUT		10/24/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ S&P 500 DEC 15 2590 CALL [OT] LOCATION: US DESCRIPTION: CALL		11/14/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒		11/28/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
S&P 500 DEC 29 2625 CALL [OT] LOCATION: US DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ S&P 500 DEC 6 2450 PUT [OT] LOCATION: US DESCRIPTION: PUT		11/7/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ S&P 500 NOV 17 2565 CALL [OT] LOCATION: US DESCRIPTION: CALL		10/18/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ S&P 500 NOV 17 2565 CALL [OT] LOCATION: US DESCRIPTION: CALL		11/14/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ S&P 500 NOV 29 2465 PUT [OT] LOCATION: US DESCRIPTION: PUT		11/7/2017	P	\$15,001 - \$50,000	
TD Ameritrade Investment Account ⇒ S&P 500 NOV 30 2575 CALL [OT] LOCATION: US DESCRIPTION: CALL		10/30/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ S&P 500 NOV 30 2575 CALL [OT] LOCATION: US DESCRIPTION: CALL		11/28/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ S&P 500 OCT 20 2535 CALL [OT] LOCATION: US DESCRIPTION: CALL		10/5/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ S&P 500 OCT 20 2550 CALL [OT] LOCATION: US DESCRIPTION: CALL		10/5/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒		10/18/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
S&P 500 OCT 20 2550 CALL [OT] LOCATION: US DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ S&P 500 OCT 31 2550 CALL [OT] LOCATION: US DESCRIPTION: CALL		10/30/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ SPDR GLD NOV 17 122.5 PUT [OT] LOCATION: US DESCRIPTION: PUT		11/2/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPDR GLD NOV 3 123 PUT [OT] LOCATION: US DESCRIPTION: PUT		11/2/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ SPDR GOLD SHS GLD MAY 12 117.5 PUT [OT] LOCATION: US DESCRIPTION: PUT		05/9/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ SPDR GOLD SHS GLD MAY 26 117 PUT [OT] LOCATION: US DESCRIPTION: PUT		05/9/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPDR GOLD SHS MAR 10 117 PUT [OT] LOCATION: US DESCRIPTION: PUT		03/3/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ SPDR GOLD TR SHS MAR 24 118 CALL [OT] LOCATION: US DESCRIPTION: CALL		03/21/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ SPX DEC 15 2590 CALL [OT] LOCATION: US DESCRIPTION: CALL		12/12/2017	P	\$15,001 - \$50,000	
TD Ameritrade Investment Account ⇒		12/28/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SPX DEC 29 2625 CALL [OT] LOCATION: US DESCRIPTION: CALL					
TD Ameritrade Investment Account ⇒ SPX JAN 31 2650 CALL [OT] LOCATION: US DESCRIPTION: CALL		12/28/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ SPX JUN 29 2700 CALL [OT] LOCATION: US DESCRIPTION: CALL		12/12/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT FEB 3 122 CALL [OT] LOCATION: US DESCRIPTION: CALL		01/18/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JAN 120 CALL [OT] LOCATION: US DESCRIPTION: CALL		01/18/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ TLT JAN 13 122 CALL [OT] LOCATION: US DESCRIPTION: CALL		01/12/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ TLT JAN 20 121 CALL [OT] LOCATION: US DESCRIPTION: CALL		01/5/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JAN 27 123 CALL [OT] LOCATION: US DESCRIPTION: CALL		01/12/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JAN 6 120 CALL [OT] LOCATION: US DESCRIPTION: CALL		01/5/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒		07/6/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TLT JUL 21 124.5 PUT [OT] LOCATION: US DESCRIPTION: PUT					
TD Ameritrade Investment Account ⇒ TLT JUL 7 125 PUT [OT] LOCATION: US DESCRIPTION: PUT		07/6/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ TLT JUL 7 126 CALL [OT] LOCATION: US DESCRIPTION: CALL		06/23/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade Investment Account ⇒ TLT JUN 23 125.5 CALL [OT] LOCATION: US DESCRIPTION: CALL		06/23/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ UVXY AUG 11 43 CALL [OT] LOCATION: US DESCRIPTION: CALL		08/11/2017	P	\$1,001 - \$15,000	
TD Ameritrade Investment Account ⇒ UVXY AUG 11 43 CALL [OT] LOCATION: US DESCRIPTION: CALL		08/11/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ American Funds Capital Income Builder Fund (CAIFX) [MF]		07/3/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ American Funds Capital Income Builder Fund (CAIFX) [MF]		07/28/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ American Funds Capital Income Builder Fund (CAIFX) [MF]		08/11/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ American Funds Capital World Growth and Income Fund (WGIFX) [MF]		07/3/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ American Funds Capital World Growth and Income Fund (WGIFX) [MF]		07/28/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ American Funds Capital World Growth and Income Fund (WGIFX) [MF]		08/11/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Fidelity 500 Index Fund (FXSIX) [MF]		07/3/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Fidelity 500 Index Fund (FXSIX) [MF]		07/28/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Fidelity 500 Index Fund (FXSIX) [MF]		08/11/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ IQ Hedge Multi-Strategy Tracker (QAI) [EF]		06/29/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ IQ Hedge Multi-Strategy Tracker (QAI) [EF]		07/14/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ IQ Hedge Multi-Strategy Tracker (QAI) [EF]		07/29/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ IQ Hedge Multi-Strategy Tracker (QAI) [EF]		08/11/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares MSCI EAFE Index Fund (EFA) [EF]		06/29/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares MSCI EAFE Index Fund (EFA) [EF]		07/14/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares MSCI EAFE Index Fund (EFA) [EF]		07/28/2017	P	\$50,001 - \$100,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares MSCI EAFE Index Fund (EFA) [EF]		08/11/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Growth Index (IWF) [EF]		06/29/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Growth Index (IWF) [EF]		07/14/2017	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Growth Index (IWF) [EF]		07/28/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Growth Index (IWF) [EF]		08/11/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Value Index (IWD) [EF]		06/29/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Value Index (IWD) [EF]		07/14/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Value Index (IWD) [EF]		07/28/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 1000 Value Index (IWD) [EF]		08/11/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 2000 Index (IWM) [EF]		06/29/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 2000 Index (IWM) [EF]		07/14/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 2000 Index (IWM) [EF]		07/28/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ iShares Russell 2000 Index (IWM) [EF]		08/11/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Schwab Fundamental International Large Company Index Fund (SFNNX) [MF]		07/3/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Schwab Fundamental International Large Company Index Fund (SFNNX) [MF]		07/28/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Schwab Fundamental International Large Company Index Fund (SFNNX) [MF]		08/11/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR Dow Jones Global Real Estate (RWO) [EF]		06/29/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR Dow Jones Global Real Estate (RWO) [EF]		07/14/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR Dow Jones Global Real Estate (RWO) [EF]		07/28/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR Dow Jones Global Real Estate (RWO) [EF]		08/11/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR S&P MidCap 400 (MDY) [EF]		06/29/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR S&P MidCap 400 (MDY) [EF]		07/14/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR S&P MidCap 400 (MDY) [EF]		07/28/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ SPDR S&P MidCap 400 (MDY) [EF]		08/11/2017	P	\$1,001 - \$15,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ T. Rowe Price Dividend Growth Fund (PRDGX) [MF]		07/3/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ T. Rowe Price Dividend Growth Fund (PRDGX) [MF]		07/28/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ T. Rowe Price Dividend Growth Fund (PRDGX) [MF]		08/11/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Vanguard Dividend Appreciation Index Fund (VDADX) [MF]		07/5/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Vanguard Dividend Appreciation Index Fund (VDADX) [MF]		07/28/2017	P	\$15,001 - \$50,000	
Wells Fargo Advisors-JM Chu Irrevocable Trust II ⇒ Vanguard Dividend Appreciation Index Fund (VDADX) [MF]		08/11/2017	P	\$15,001 - \$50,000	

* 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
California Public Employees Retirement System	Defined Benefit	\$21,894.00
California State Teachers Retirement Income	Defined Benefit	\$30,473.00
Los Angeles Community College District Board of Trustees	spouse salary	N/A
Law Office of Eng & Nishimura	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	BB&T	May 2010	Mortgage on personal residence, Washington DC (not rented)	\$50,001 - \$100,000
	Capitol Hill Tower Housing Cooperative	May 2010	Mortgage on underlying property of personal residence, Washington DC (not rented)	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member (uncompensated)	Asian Pacific American Institute for Congressional Studies
Board Member (uncompensated)	APAICS Leadership Network

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2001	Myself and California State Teachers Retirement System	Defined pension benefit plan for teaching position in the LA Community College District
May 2001	Myself and California Public Employees Retirement System	Defined pension benefit plan for service on Monterey Park City Council

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

- Chu-Lim Investments LLC
LOCATION: US
- Lincoln Financial Group
- Savings Plus
- TD Ameritrade Investment Account
LOCATION: US
- Vanguard Investment Account
LOCATION: US
- Wells Fargo Advisors-JM Chu Irrevocable Trust II
LOCATION: US
- Wells Fargo Advisors-Stocks
LOCATION: US
- Zurich Advantage III

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. Judy Chu , 05/15/2018