



Filing ID #10023743

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Stephen F. Lynch  
**Status:** Member  
**State/District:** MA08

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2017  
**Filing Date:** 05/24/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3 Jason Terrace [RP]  LOCATION: Boston, MA, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
403(b) ⇒ American Funds Euro-Pacific [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ American Funds Growth Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ American Funds Income Funds [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Blackrock Small Cap Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Fidelity Balanced Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Fidelity Contra Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
403(b) ⇒ Oppenheimer Developing Markets [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
55 G Street [RP]	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Boston, MA, US					
Bank of America [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
East Boston Savings Bank [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
IRA ⇒ Cisco Systems, Inc. (CSCO) [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Dell Technologies Inc. Class V (DVMT) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
IRA ⇒ Intel Corporation (INTC) [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Morgan Stanley Institutional Fund Growth Portfolio [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Morgan Stanley Money Market Fund [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Pioneer Equity Income Fund [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Pioneer Mid-Cap Growth Fund [IH]		\$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

None disclosed.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount
South Boston Community Health Center	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	East Boston Savings Bank	Refinanced 2011	Mortgage on Primary Residence	\$250,001 - \$500,000
JT	Ocwen Financial Corporation	September 2013	Mortgage on Rental Property	\$100,001 - \$250,000
	COMMENTS: Rental Property -- 3 Jason Terrace, South Boston, Ma			
JT	Congressional Federal Credit Union	November 2008	Home Equity Line of Credit	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors	Boys & Girls Clubs of Dorchester
COMMENTS: Founded as the Colonel Daniel Marr Boys Club	
Advisory Board	Edgerley Family South Boston Club
COMMENTS: Previously listed as South Boston Boys & Girls Club	

SCHEDULE F: AGREEMENTS

None disclosed.

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?
The Aspen Institute, Inc.	05/29/2017	06/4/2017	Boston, Massachusetts - Berlin, Germany - Boston, Massachusetts	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Aspen Institute, Inc.	02/18/2017	02/27/2017	Boston, Massachusetts - New Delhi, India - Boston, Massachusetts	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

- 403(b)
- IRA

## 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. Stephen F. Lynch , 05/24/2018