



Filing ID #10027963

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Christine Bubser
Status: Congressional Candidate
State/District: CA08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 08/12/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Amplify.LA Capital II, L.L.C. [HE]	JT	\$15,001 - \$50,000	None		
Hulu, LLC - 401(k) Plan ⇒ AF Target Date 2030 R6 (RFETX) [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
JPMorgan Chase Bank, N.A. [BA]	DC	\$1,001 - \$15,000	None		
JPMorgan Chase Bank, N.A. [BA]	DC	\$1,001 - \$15,000	None		
JPMorgan Chase Bank, N.A. [BA]	JT	\$50,001 - \$100,000	None		
DESCRIPTION: Checking & Savings					
Lincoln National Life Insurance Co. [WU]	SP	\$50,001 - \$100,000	None		
SSgA Upromise 529 Plan # 1 ⇒ SSgA College 2018 Portfolio [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		
TIAA - ScholarShare 529 College Savings Plan # 2 ⇒ Passive Age-Based Portfolio 18 & Over [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TIAA - ScholarShare 529 College Savings Plan # 3 ⇒ Passive Age-Based Portfolio 16 [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo - Bubser Baron Family Trust # 1 ⇒ Apple Inc. (AAPL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Wells Fargo - Bubser Baron Family Trust # 1 ⇒ Blackrock Science & Technology TR II Shs Ben Int (BSTZ) [MF]	JT	\$15,001 - \$50,000	None		
Wells Fargo - Bubser Baron Family Trust # 1 ⇒ Pimco Energy & Tactical Credit Opportunities Fund (NRGX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Wells Fargo - Bubser Baron Family Trust # 1 ⇒ Wells Fargo Cash [BA]	JT	\$15,001 - \$50,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Allianzgi NFJ Dividend Int & Prem Strategy Fund (NFJ) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ AngloGold Ashanti Limited (AU) [ST]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Barrick Gold Corporation Common Stock (GOLD) [ST]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Blackrock Muni Yield California Quality Fund (MCA) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Eaton Vance Tax-Managed Buy-Write Opportunities Fund (ETV) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Eaton Vance Tax-Managed Global Buy-Write Opportunities Fund (ETW) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Global X MLP & Energy Infrastructure (MLPX) [EF]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Invesco Calf Value Mun Income Trust (VCV) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ IVA Worldwide Fund Class I (IVWIX) [MF]	JT	\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Nuveen Core Equity Alpha Fund (JCE) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Nuveen Intermediate Duration Muni Bond (NUVBX) [EF]	JT	None	Dividends	None	\$1,001 - \$2,500
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Snap Inc. Class A (SNAP) [ST]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ SPDR Gold Trust (GLD) [EF]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Wells Fargo Cash [BA]	JT	\$1,001 - \$15,000	None		
Wells Fargo IRA ⇒ Baird Funds Inc MidCap Fund Instl (BMDIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Chartwell Funds Small Cap Value Fund (CWSIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ FMI Large Cap Fund Institutional Class (FMIQX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ Gabelli Equity Ser Fund Small Cap Growth Fund Class I (GACIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Invesco Oppenheimer International Growth Fund CL Y (OIGYX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ Investment Managers Ser 361 Global Long/Short Equity Fund CL I (AGAZX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ iShares 7-10 Yr Treasury Bond ETF (IEF) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ iShares Inc. Core MSCI Emerging Markets (IEMG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ iShares JP Morgan USD Emerging Markets Bond (EMB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Ishares Russell Mid-Cap ETF (IWR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ John Hancock Funds II Global Absolute Return Strategies Fund CL I (JHAIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ John Hancock Funds III Disciplined Value MidCap Fund CL I (JVMIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Pear Tree Funds Foreign Value Fund Instl (QFVIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ Pimco Dynamic Credit and Mortgage Income Fund (PCI) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ SPDR S&P 500 ETF TR Unit Ser 1 (SPY) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo IRA ⇒ Vanguard Total World Stock Index Fund (VT) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Wells Fargo Standard Bank Deposit [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Baird Funds Inc MidCap FD Instl CL (BMDIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo Sep IRA ⇒ Blackrock Science & Technology (BST) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Chartwell Funds Small Cap Value Fund (CWSIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ FMI Large Cap Fund Instl Class (FMIQX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Gabelli Equity Ser Fund Small Cap Growth Fund Class I (GACIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Invesco Oppenheimer International Growth Fund CL Y (OIGYX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Investment Managers SER 361 Global Long/Short Equity Fund CL I (AGAZX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ iShares 7-10 Yr Treasury Bond ETF (IEF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ iShares Inc Core MSCI Emerging Markets (IEMG) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ iShares JP Morgan USD Emerging Markets Bond (EMB) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Ishares Russell Mid-Cap ETF (IWR) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ John Hancock Funds II Global Absolute Return Strategies FD CL I (JHAIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo Sep IRA ⇒ John Hancock Funds III Disciplined Value MidCap Fund CL I (JVMIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Nuveen Nasdaq 100 Dynamic Overwrite Fund (QQQX) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Pear Tree Funds Foreign Value Fund Instl (QFVIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ SPDR S&P 500 ETF TR Unit Ser 1 (SPY) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Vanguard Total World Stock Index Fund (VT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Wells Fargo Standard Bank Deposit [IH]		\$100,001 - \$250,000	Tax-Deferred		

* 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
Abelson Taylor Inc.	Salary	N/A	\$151,759.16
Hulu	Spouse Salary	N/A	N/A
University of Southern California	Spouse Salary	N/A	N/A
Coleman Research	Spouse Consulting	N/A	N/A
Third Bridge, Inc.	Spouse Consulting	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	American Express	July 2019	Credit card	\$15,001 - \$50,000
SP	Chase	July 2019	Credit card	\$15,001 - \$50,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo	May 2018	Priority Credit Line - Securities Backed Line of Credit	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- o Hulu, LLC - 401(k) Plan (Owner: SP)
- o SSgA Upromise 529 Plan # 1 (Owner: DC)
LOCATION: NV
- o TIAA - ScholarShare 529 College Savings Plan # 2 (Owner: DC)
LOCATION: CA
- o TIAA - ScholarShare 529 College Savings Plan # 3 (Owner: DC)
LOCATION: CA
- o Wells Fargo - Bubser Baron Family Trust # 1 (Owner: JT)
LOCATION: US
- o Wells Fargo - Bubser Baron Family Trust # 2 (Owner: JT)
LOCATION: US
- o Wells Fargo IRA (Owner: SP)
- o Wells Fargo Sep IRA

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: Christine Bubser , 08/12/2019