



Filing ID #10036611

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Derek Kilmer
Status: Member
State/District: WA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/12/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Checking [BA]	JT	\$1 - \$1,000	None		<input type="checkbox"/>
Bridge Builder Core Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
Bridge Builder Core Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
Bridge Builder Core Plus Bond [MF]		None	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Core Plus Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: purchase					
Bridge Builder Core Plus Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: purchase					
Bridge Builder INTL Equity [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder INTL Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bridge Builder Large Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
Bridge Builder Large Growth [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
Bridge Builder Large Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Large Value [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
Bridge Builder Smallmid Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Smallmid Growth [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Smallmid Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder SMallmid Value [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Capital Income Builder Fund Cl A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Capital Income Builder Fund CL A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Clgam 529 College 2024A [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
LOCATION: WA					
Clgam 529 College 2027A [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
LOCATION: WA					
Edward Jones ⇒ Goldman Sachs FINL Square Govt Fd Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: purchase					
Edward Jones Insured Bank Money Market [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Retirement Money Market [BA]		\$1 - \$1,000	Interest	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Retirment Money Market [BA]	SP	\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Goldman Sachs FINL Square Govt Fd Instl [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: purchase					
Hotchkis & Wiley Funds High Yield Fund Cl I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Hotchkis & Wiley High-Yield [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares MSCI EAFE Small Cap Et [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares MSCI EAFE SSmall Cap Et [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Rus Mid Cap ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Russ 2000 Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Russell 1000 ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
iShares Russell 1000 Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Russell 2000 Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Russell Midcap Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Kitsap Bank Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
McKinsey & Co. Profit Sharing Retirement Plan and Money Purchase Pension Plan [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
NC Property [RP]	SP	\$50,001 - \$100,000	Rent	None	<input type="checkbox"/>
LOCATION: Sunset Beach, NC, US					
Vanguard FTSE Developed Markets ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: purchase					
Vanguard FTSE Developed Markets ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: purchase					
Vanguard Index TR Vanguard Value ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
Vanguard Index TR Vanguard Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
WA State PERS Plan 2 [DB]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
WA STate PERS Plan 2 [DB]		\$15,001 - \$50,000	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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones ⇒ Bridge Builder Core Bond Fund [MF]		03/12/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones ⇒ Bridge Builder Core Bond Fund [MF]		03/12/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones ⇒ Bridge Builder Core Plus Bond Fund [MF]		03/12/2019	P	\$1,001 - \$15,000	
Edward Jones ⇒ Bridge Builder Core Plus Bond Fund [MF]		03/12/2019	P	\$1,001 - \$15,000	
Edward Jones ⇒ Bridge Builder Large Growth [MF]		12/17/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones ⇒ Bridge Builder Large Growth [MF]		12/18/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones ⇒ Bridge Builder Large Value [MF]		12/18/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones ⇒ Goldman Sachs FINL Sqr Govt FD [MF]		12/17/2019	P	\$1,001 - \$15,000	
Edward Jones ⇒ Goldman Sachs FINL Sqr Govt FD [MF]		12/18/2019	P	\$1,001 - \$15,000	
Edward Jones ⇒ IShares Russell 1000 ETF [EF]		12/18/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones ⇒ Vanguard FTSE Developed Markets [EF]		12/17/2019	P	\$1,001 - \$15,000	
Edward Jones ⇒ Vanguard FTSE Developed Markets [EF]		12/18/2019	P	\$1,001 - \$15,000	
Edward Jones ⇒ Vanguard Index TR Vanguard Value ETF [EF]		12/18/2019	S (partial)	\$1,001 - \$15,000	<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 C: EARNED INCOME

Source	Type	Amount
State of Washington	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America	December 2019	Credit card	\$15,001 - \$50,000
JT	US Bank	January 2016	Mortgage on residence	\$100,001 - \$250,000
JT	Chase Bank	August 2019	Credit Card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee (uncompensated)	Princeton University

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	State of Washington	Public Employees Retirement System Plan 2
October 1999	McKinsey and Company Profit Sharing Retirement/Pension Plan	Retirement plan managed for McKinsey and Co. by Alight

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?
Princeton University	01/17/2019	01/19/2019	Washington, DC - Princeton, NJ - Seattle, WA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Faith and Politics Institute	03/1/2019	03/3/2019	Washington, DC - Birmingham, AL - Montgomery, AL - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Princeton University	04/4/2019	04/7/2019	Washington, DC - Princeton, NJ - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Association of Former Members of Congress/Congr. Study Group	04/13/2019	04/19/2019	Seattle, WA - Incheon (Seoul), Korea - Seattle, WA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Princeton University	06/1/2019	06/3/2019	Seattle, WA - Princeton, NJ - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Princeton University	09/27/2019	09/28/2019	Washington, DC - Princeton, NJ - Philadelphia, PA - Seattle, WA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
American Congressional Exchange/Bipartisan Policy Center	10/1/2019	10/2/2019	Seattle, WA - Denver, CO - Bentonville, Arkansas - Minneapolis-St. Paul, Minnesota - Seattle, WA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Princeton University	11/21/2019	11/23/2019	Washington, DC - Princeton, NJ - Philadelphia, PA -	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Seattle, WA							

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

o Edward Jones

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. Derek Kilmer , 08/12/2020