



Filing ID #10055519

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Summer Lee  
**Status:** Member  
**State/District:** PA12

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2022  
**Filing Date:** 08/13/2023  
**Period Covered:** 01/01/2021– 12/31/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Pennsylvania State Employees Retirement System Pension Plan [PE]		\$15,001 - \$50,000	None		
PNC Bank Virtual Wallet Growth Account [BA]		\$15,001 - \$50,000	Interest	Not Applicable	\$1 - \$200

\* 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
Pennsylvania House of Representatives	Salary	N/A	\$88,533.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	American Education Services	August 2005 - May 2009	Student Loan debt	\$15,001 - \$50,000

<b>Owner Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
Aidvantage/Navient	August 2005 - May 2009; August 2012 - May 2015	Consolidated student loan debt for Penn State and Howard University School of Law	\$250,001 - \$500,000
Citizen Bank	January 7, 2021	Mortgage on Personal Residence	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Board Chair	UNITE PAC
Board member	New Pennsylvania Project
Representative	Pennsylvania House of Representatives

## SCHEDULE F: AGREEMENTS

<b>Date</b>	<b>Parties To</b>	<b>Terms of Agreement</b>
December 2022	Pennsylvania State Employees Retirement System; Summer Lee	Continued participation in pension plan.

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

None disclosed.

## 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:** Hon. Summer Lee , 08/13/2023