



Filing ID #10049816

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Jennifer Wexton
Status: Member
State/District: VA10

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2021
Filing Date: 06/19/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Costco Wholesale Corporation (COST) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 500 Index Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 500 Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 500 Index Fund [MF]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Century Small Cap Select Investor [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Contrafund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Contrafund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Diversified International [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Dividend Growth [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Extd Market Index Premium Class [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Freedom 2040 [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Int'l Discovery [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Leveraged Company Stock [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Low Priced Stock (FLPSX) [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Small Cap Index [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
iShares MSCI EAFE ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
MissionSquare MP Trad Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: \					
MSQ AMG TimesSquare Mid Cap Gr [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
MSQ Contrafund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
MSQ Virtus NFJ Dividend Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Powershares QQQ Tr Unit Ser 1 [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Principal LgCap S&P 500 Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Principal MidCap S&P 400 Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Principal SmallCap S&P Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Schwab - Pioneer Large Cap Growth [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Schwab - Vanguard Institutional Index I [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Dodge & Cox Stock Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Schwab -Vanguard LifeStrategy Growth Inv [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Spdr Dow Jones Indl Average ETF Tr Unit [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Total Stock Market Index Fund [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
VRS Hybrid 401(a) plan [PE]		\$1,001 - \$15,000	None		<input type="checkbox"/>

* 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
Loudoun County Public Schools	Spouse Salary	\$346.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Atlantic Union Bank (F/K/A Middleburg Bank)	October 2015	Mortgage Loan	\$50,001 - \$100,000
JT	Atlantic Union Bank (F/K/A Middleburg Bank)	December 2021	HELOC	\$10,000 - \$15,000
JT	Fifth Third Bank	February 2021	Mortgage Loan	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

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?
J Street Educ. Fund trip to Israel and Palestinian Terr.	02/18/2022	02/25/2022	Washington DC - Tel Aviv - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Jennifer Wexton , 06/19/2022