



Filing ID #10054507

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Adam B. Schiff
Status: Member
State/District: CA30

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 08/11/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Brokerage ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Brokerage ⇒ Fidelity Cash Reserves [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Franklin Templeton ⇒ Franklin Growth Opportunities Fund Class A (FGRAX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Franklin Templeton ⇒ Franklin Mutual Global Discovery Fund Class A (TEDIX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Franklin Templeton ⇒ Franklin Rising Dividends Fund Class A (FRDPX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Franklin Templeton ⇒ Franklin Templeton Mutual Shares Fund Class A (TESIX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Inherited IRA ⇒ T Rowe Price New Horizons (PRNHX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Midnight in Washington [OT]		Undetermined	Royalties	\$100,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: Book approved by ethics committee					
UBS ⇒ Apple Inc. (AAPL) [ST]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
UBS ⇒ I Shares Trust Core S&P 500 Index (IVV) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
UBS ⇒ Invesco QQQ Trust (QQQ) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
UBS ⇒ UBS Bank USA Deposit [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
UBS - Individual Retirement Account ⇒ Fidelity Puritan Fund (FPURX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
UBS - Individual Retirement Account ⇒ I Shares Trust Core S&P 500 Index (IVV) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
UBS - Individual Retirement Account ⇒ Invesco QQQ Trust (QQQ) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
UBS - Individual Retirement Account ⇒ UBS Bank USA Deposit [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
UBS - Individual Retirement Account ⇒ WP Carey Inc REIT (WPC) [RE]		\$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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Brokerage ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	JT	07/15/2022	P	\$15,001 - \$50,000	
Fidelity Brokerage ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	JT	08/31/2022	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Franklin Templeton ⇒ Franklin Growth Opportunities Fund Class A (FGRAX) [MF]	JT	12/15/2022	P	\$1,001 - \$15,000	
Franklin Templeton ⇒ Franklin Mutual Global Discovery Fund Class A (TEDIX) [MF]	JT	10/3/2022	P	\$1,001 - \$15,000	
Franklin Templeton ⇒ Franklin Mutual Global Discovery Fund Class A (TEDIX) [MF]	JT	12/15/2022	P	\$1,001 - \$15,000	
Franklin Templeton ⇒ Franklin Mutual Global Discovery Fund Class A (TEDIX) [MF]	JT	12/20/2022	P	\$1,001 - \$15,000	
Franklin Templeton ⇒ Franklin Rising Dividends Fund Class A (FRDPX) [MF]	JT	12/15/2022	P	\$1,001 - \$15,000	
Franklin Templeton ⇒ Franklin Templeton Mutual Shares Fund Class A (TESIX) [MF]	JT	10/3/2022	P	\$1,001 - \$15,000	
Franklin Templeton ⇒ Franklin Templeton Mutual Shares Fund Class A (TESIX) [MF]	JT	12/15/2022	P	\$1,001 - \$15,000	
UBS - Individual Retirement Account ⇒ Fidelity Puritan Fund (FPURX) [MF]	SP	12/19/2022	P	\$1,001 - \$15,000	
UBS - Individual Retirement Account ⇒ Invesco QQQ Trust (QQQ) [EF]		01/7/2022	P	\$1,001 - \$15,000	

* 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
Naborforce	Spouse wage	N/A
T. Rowe Price	Spouse inherited IRA distribution	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	UBS Financial Services Inc	Various dates in 2022	Margin loan on portfolio	\$100,001 - \$250,000
	Mr. Cooper	November 2017	Mortgage on private residence in Potomac, MD	\$250,001 - \$500,000
	COMMENTS: Mortgage was acquired by Mr. Cooper on 3/4/22; previously held with Freedom Mortgage.			
JT	Snapfi	November 2020	Mortgage on private residence in Burbank, CA	\$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?
Forum Club of Palm Beaches	01/21/2022	01/21/2022	Washington, DC - Palm Beach, FL - Washington, DC	0		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuscon Festival of Books	03/11/2022	03/12/2022	Philadelphia, PA - Tucson, AZ - Austin, TX - Washington, DC	0		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rancho Mirage Writers Festival	05/6/2022	05/8/2022	Burbank, CA - Rancho Mirage, CA - Burbank, CA	0		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Source	Activity	Date	Amount	Charity Name
Los Angeles Times Festival of Books	Article	04/22/2022	\$500.00	Burbank Temporary Aid Center

SCHEDULE A AND B ASSET CLASS DETAILS

- Fidelity Brokerage (Owner: JT)
LOCATION: US
- Franklin Templeton (Owner: JT)
LOCATION: US
- Inherited IRA (Owner: SP)
- UBS (Owner: SP)
LOCATION: US
- UBS - Individual Retirement Account
- UBS - Individual Retirement Account (Owner: SP)

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. Adam B. Schiff , 08/11/2023