



Filing ID #10052833

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Andy Kim
Status: Member
State/District: NJ03

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 07/10/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Checking [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of America Savings [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Equitable Brightlife Grow Series 155 Core Russell 2000 1yr. [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Equitable Brightlife Grow Series 155 Core S&P 500 1yr. [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Equitable Brightlife Grow Series 155 Guaranteed Interest [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Equitable Brightlife Grow Series Core S&P 500 3yr. [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Equitable Structured Capital Strategies 16B NASDAQ 100 1yr. 10% Buffer [OT] DESCRIPTION: Variable Annuity		\$15,001 - \$50,000	None		<input type="checkbox"/>
Equitable Structured Capital Strategies 16B Russell 2000 5yr. Annual Lock 10% Buffer [OT] DESCRIPTION: Variable Annuity		\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Equitable Structured Capital Strategies 16B S&P 500 1yr. 10% Buffer [OT]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Variable Annuity					
Equitable Structured Capital Strategies 16B S&P 500 5yr. Annual Lock 10% Buffer [OT]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Variable Annuity					
Merrill Edge 529 ⇒ BlackRock Advantage International Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Edge 529 ⇒ BlackRock Advantage Large Cap Gr Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Edge 529 ⇒ BlackRock Capitol Appreciation Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Edge 529 ⇒ BlackRock Equity Dividend Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Edge 529 ⇒ BlackRock International Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Edge 529 ⇒ BlackRock Large Cap Focus Value Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Edge 529 ⇒ BlackRock Strategic Income Opps Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Edge 529 ⇒ BlackRock Total Return Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Edge 529 ⇒ IShares MSCI Total Intl Idx Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Edge 529 ⇒ IShares S&P 500 Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rental [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Washington, DC, US					
DESCRIPTION: Rental income					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
T.Rowe Price 401K ⇒ T Rowe Price Equity Index Tr-Z [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
T.Rowe Price 401K ⇒ T Rowe Price Growth Stock Tr-Z [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
T.Rowe Price 401K ⇒ T Rowe Price International Core Eq Tr-Z [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
T.Rowe Price 401K ⇒ T Rowe Price International Val Eq Tr-Z [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
T.Rowe Price 401K ⇒ T Rowe Price US Value Equity Tr-Z [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 Target Enrollment 2034/2035 Portfolio ⇒ Vanguard Total Bond Market II Index Fund Institutional Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 Target Enrollment 2034/2035 Portfolio ⇒ Vanguard Total International Bond Index Fund Institutional Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 Target Enrollment 2034/2035 Portfolio ⇒ Vanguard Total International Stock Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 Target Enrollment 2034/2035 Portfolio ⇒ Vanguard Total Stock Market Institutional Select [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Mutual Fund Brokerage Account ⇒ Vanguard Intermediate-Term Tax Exempt Fund Admiral Shares [MF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Vanguard Mutual Fund Brokerage Account ⇒ Vanguard Limited Tax-Exempt Fund Admiral Shares [MF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Vanguard Mutual Fund Brokerage Account ⇒ Vanguard Long-Term Tax-Exempt Fund Admiral Shares [MF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Vanguard Mutual Fund Brokerage Account ⇒ Vanguard Total International Stock ETF [EF] DESCRIPTION: Vanguard Total International Stock ETF		\$50,001 - \$100,000	Dividends	None	<input type="checkbox"/>
Vanguard Mutual Fund Brokerage Account ⇒		\$50,001 -	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Total Stock Market ETF [EF]		\$100,000			<input type="checkbox"/>
Vanguard Retirement ⇒ Vanguard Institutional Total International Stock Market index Trust II [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Retirement ⇒ Vanguard Total Bond Market II Index Fund Institutional Shares [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Retirement ⇒ Vanguard Total International Bond II Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Retirement ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares [MF]	SP	\$50,001 - \$100,000	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

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Vanguard	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Valon	July 2015	mortgage	\$250,001 - \$500,000
JT	Mr Cooper	March 2019	Mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none">◦ Merrill Edge 529 LOCATION: DC◦ T.Rowe Price 401K (Owner: SP) DESCRIPTION: Spouse Retirement◦ Vanguard 529 Target Enrollment 2034/2035 Portfolio LOCATION: NJ◦ Vanguard Mutual Fund Brokerage Account LOCATION: US◦ Vanguard Retirement (Owner: SP) DESCRIPTION: Spouse Retirement

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. Andy Kim , 07/10/2023