



Filing ID #10051430

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Gerald E. Connolly
Status: Member
State/District: VA11

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 05/12/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|----------------|-------------|-------------------------------------|
| Congressional Federal Credit Union [BA] | | \$50,001 - \$100,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Fairfax County Retirement Fund Employee Plan BG - not self-directed [DB] | | Undetermined | None | | <input type="checkbox"/> |
| Met Life Insurance Policy Cash Value [WU] | SP | \$1 - \$1,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Met Life Insurance Policy Cash Value [WU] | | \$15,001 - \$50,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Met Life Insurance Policy Cash Value [WU] | SP | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| TIAA CREF - Self ⇒ TIAA Cref Traditional Retirement [FN] | | \$100,001 - \$250,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ AMG Trust IV River Road Small Cap I [MF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| TIAA IRA - Self ⇒ Calvert Bond Fund [MF] | | \$250,001 - \$500,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------|----------------|--------------|-------------------------------------|
| TIAA IRA - Self ⇒ DFA Emerging Markets Social Core Equity Portfolio [MF] | | \$50,001 - \$100,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Self ⇒ DFA International Social Core Equity Portfolio [MF] | | \$100,001 - \$250,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Self ⇒ DFA US Social Core Equity 2 Portfolio [MF] | | \$50,001 - \$100,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ MFS International New Discovery Fund [MF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Self ⇒ Nushares Etf Trust [EF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Self ⇒ Nuveen ESG Mid-Cap Growth ETF [EF] | | None | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ Nuveen ESG Mid-Cap Value ETF [EF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ Parnassus Core Equity Fund [MF] | | \$100,001 - \$250,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Self ⇒ PIMCO Emerging Markets Local Currency and Bond Fund [MF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ TIAA Cash Accounts [BA] | | \$15,001 - \$50,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ TIAA-CREF Core Impact Bond Fund [MF] | | \$250,001 - \$500,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Self ⇒ TIAA-CREF High Yield Fund [MF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ TIAA-CREF Social Choice Equity Fund [MF] | | \$100,001 - \$250,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Self ⇒ Vanguard Short-Term Bond Index Fund [MF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ | | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|---------------------|----------------|--------------|-------------------------------------|
| Vanguard Small Cap ETF [EF] | | | | | |
| TIAA IRA - Spouse ⇒ AMG Trust IV River Road Small Cap I [MF] | SP | None | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Calvert Bond Fund [MF] | SP | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Spouse ⇒ DFA Emerging Markets Social Core Equity Portfolio [MF] | SP | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ DFA International Social Core Equity Portfolio [MF] | SP | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Spouse ⇒ DFA US Social Core Equity 2 Portfolio [MF] | SP | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ iShares Core S&P Small-Cap LCap 600 Index Fund [MF] | SP | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ MFS International New Discovery Fund [MF] | SP | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Nushares Etf Trust [EF] | SP | \$1,001 - \$15,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Nuveen ESG Mid-Cap Growth ETF [EF] | SP | None | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Nuveen ESG Mid-Cap Value ETF [EF] | SP | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Parnassus Core Equity Fund [MF] | SP | \$15,001 - \$50,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ PIMCO Emerging Markets Local Currency and Bond Fund [MF] | SP | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ TIAA Cash Accounts [BA] | SP | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ TIAA-CREF Core Impact Bond Fund [MF] | SP | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------|--------------------------|--------------------|-------------------------------------|
| TIAA IRA - Spouse ⇒ TIAA-CREF High Yield Fund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ TIAA-CREF Social Choice Equity Fund [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Vanguard Short-Term Bond Index Fund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Vanguard Small Cap ETF [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ AB High Income Municipal Bond Portfolio [MF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ AllianceBernstein High Income Municipal Portfolio [MF] | JT | None | Dividends | None | <input type="checkbox"/> |
| TIAA Joint ⇒ Allspring Municipal Bond Fund [MF] | JT | None | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Baird Short-Term Municipal Bond Fund [MF] | JT | \$100,001 - \$250,000 | Capital Gains | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Bristol-Myers Squibb Company (BMY) [ST] | JT | \$50,001 - \$100,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| TIAA Joint ⇒ Coca-Cola Company (KO) [ST] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ Dominion Energy, Inc. (D) [ST] | JT | \$100,001 - \$250,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Eversource Energy (ES) [ST] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| TIAA Joint ⇒ iShares Core MSCI EAFE ETF [EF] | JT | None | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| TIAA Joint ⇒ iShares Trust iShares ESG Aware MSCI EAFE ETF [EF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| COMMENTS: Purchase amount below \$1,000 reporting threshold. | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------|--------------------------|---------------------|-------------------------------------|
| TIAA Joint ⇒ Leidos Holdings, Inc. (LDOS) [ST] | JT | \$100,001 - \$250,000 | Capital Gains, Dividends | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Mainstay MacKay Tax Free Bond Fund [MF] | JT | \$100,001 - \$250,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Merck & Company, Inc. Common Stock (MRK) [ST] | JT | \$15,001 - \$50,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| TIAA Joint ⇒ Nuveen Virginia Municipal Bond Fund [MF] | JT | None | Dividends | \$2,501 - \$5,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Nuveen ESG International Development [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Nuveen ESG Large-Cap Growth Fund [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| TIAA Joint ⇒ Nuveen ESG Large-Cap Value ETF [EF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Nuveen Intermediate Duration Municipal Bond Fund [MF] | JT | None | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Nuveen Limited Term Municipal Bond Fund [MF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ Organon & Co. (OGN) [ST] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| TIAA Joint ⇒ PIMCO Emerging Markets Local Currency and Bond Fund [MF] | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ Procter & Gamble Company (PG) [ST] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC) [ST] | JT | \$100,001 - \$250,000 | Capital Gains, Dividends | \$15,001 - \$50,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ TIAA Cash Deposit Accounts [BA] | JT | \$15,001 - \$50,000 | Interest | \$201 - \$1,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|--------------|-------------------------|-----------------------|-----------------|--------------------------|
| TIAA Joint ⇒ Walt Disney Company (DIS) [ST] | JT | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| TIAA Joint ⇒ Wells Fargo & Company (WFC) [ST] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| TIAA Joint ⇒ Zimmer Biomet Holdings, Inc. (ZBH) [ST] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Truist [BA] | JT | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Truist Money Market - Federated Virginia Municipal Cash TR SS [BA] | | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| United Bank [BA] | | \$50,001 - \$100,000 | Interest | \$201 - \$1,000 | <input type="checkbox"/> |
| US Senate Federal Credit Union IRA Account [IH] | | None | Tax-Deferred | | <input type="checkbox"/> |
| US Senate Federal Credit Union Savings Accounts [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <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? |
|---|--------------|-------------|-----------------|---------------------|-------------------------------|
| TIAA IRA - Self ⇒ AMG Trust IV River Road Small Cap I [MF] | | 08/4/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ Calvert Bond Fund [MF] | | 08/30/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ Calvert Bond Fund [MF] | | 12/2/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ DFA Emerging Markets Social Core Equity Portfolio [MF] | | 09/6/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ DFA International Social Core Equity Portfolio [MF] | | 08/30/2022 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------------|---------------------|--------------------------|
| TIAA IRA - Self ⇒ DFA International Social Core Equity Portfolio [MF] | | 09/6/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ DFA International Social Core Equity Portfolio [MF] | | 12/2/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ MFS International New Discovery Fund [MF] | | 09/6/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ Nushares Etf Trust [MF] | | 02/7/2022 | P | \$15,001 - \$50,000 | |
| TIAA IRA - Self ⇒ Parnassus Core Equity Fund [MF] | | 09/6/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ Parnassus Core Equity Fund [MF] | | 12/15/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ Parnassus Core Equity Fund [MF] | | 12/21/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ TIAA-CREF Core Impact Bond Fund [MF] | | 08/30/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ TIAA-CREF Core Impact Bond Fund [MF] | | 12/2/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ TIAA-CREF Social Choice Equity Fund [MF] | | 02/7/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ TIAA-CREF Social Choice Equity Fund [MF] | | 09/6/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ TIAA-CREF Social Choice Equity Fund [MF] | | 12/2/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA IRA - Self ⇒ TIAA-CREF Social Choice Equity Fund [MF] | | 12/14/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Self ⇒ Vanguard Small Cap ETF [MF] | | 08/4/2022 | P | \$15,001 - \$50,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|-------------|-----------------------|-------------------------------------|
| TIAA IRA - Self ⇒ Vanguard Small Cap ETF [MF] | | 08/30/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ AMG Trust IV River Road Small Cap I [MF] | SP | 08/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Calvert Bond Fund [MF] | SP | 08/30/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ DFA International Social Core Equity Portfolio [MF] | SP | 12/2/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Nushares Etf Trust [MF] | SP | 02/7/2022 | P | \$1,001 - \$15,000 | |
| TIAA IRA - Spouse ⇒ TIAA-CREF Core Impact Bond Fund [MF] | SP | 08/2/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA IRA - Spouse ⇒ Vanguard Small Cap ETF [EF] | SP | 08/4/2022 | P | \$1,001 - \$15,000 | |
| TIAA Joint ⇒ AB High Income Municipal Bond Portfolio [MF] | JT | 10/22/2022 | P | \$1,001 - \$15,000 | |
| TIAA Joint ⇒ AllianceBernstein High Income Municipal Portfolio [MF] | JT | 10/13/2022 | E | \$15,001 - \$50,000 | |
| DESCRIPTION: Alliance Bernstein High Income Municipal Portfolio shares exchanged for AB High Income Municipal Bond Portfolio Shares | | | | | |
| TIAA Joint ⇒ Allspring Municipal Bond Fund [MF] | JT | 08/30/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ Allspring Municipal Bond Fund [MF] | JT | 12/2/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ Baird Short-Term Municipal Bond Fund [MF] | JT | 02/5/2022 | P | \$1,001 - \$15,000 | |
| TIAA Joint ⇒ Baird Short-Term Municipal Bond Fund [MF] | JT | 12/2/2022 | P | \$100,001 - \$250,000 | |
| TIAA Joint ⇒ Dominion Energy, Inc. (D) [ST] | JT | 08/30/2022 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------------|-----------------------|-------------------------------------|
| TIAA Joint ⇒ Dominion Energy, Inc. (D) [ST] | JT | 12/6/2022 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Leidos Holdings, Inc. (LDOS) [ST] | JT | 08/30/2022 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Leidos Holdings, Inc. (LDOS) [ST] | JT | 12/6/2022 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ Mainstay MacKay Tax Free Bond Fund [MF] | JT | 03/15/2022 | P | \$100,001 - \$250,000 | |
| TIAA Joint ⇒ Mainstay MacKay Tax Free Bond Fund [MF] | JT | 04/28/2022 | S | \$100,001 - \$250,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ Mainstay MacKay Tax Free Bond Fund [MF] | JT | 12/2/2022 | P | \$100,001 - \$250,000 | |
| TIAA Joint ⇒ Mainstay MacKay Tax Free Bond Fund [MF] | JT | 12/5/2022 | P | \$1,001 - \$15,000 | |
| TIAA Joint ⇒ Nuveen ESG International Development [MF] | JT | 12/2/2022 | P | \$1,001 - \$15,000 | |
| TIAA Joint ⇒ Nuveen ESG Large-Cap Value ETF [MF] | JT | 12/2/2022 | P | \$1,001 - \$15,000 | |
| TIAA Joint ⇒ Nuveen Intermediate Duration Municipal Bond Fund [MF] | JT | 08/30/2022 | P | \$1,001 - \$15,000 | |
| TIAA Joint ⇒ Nuveen Intermediate Duration Municipal Bond Fund [MF] | JT | 12/2/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ Nuveen Virginia Municipal Bond Fund [MF] | JT | 03/15/2022 | S | \$100,001 - \$250,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ Nuveen Virginia Municipal Bond Fund [MF] | JT | 04/28/2022 | P | \$100,001 - \$250,000 | |
| TIAA Joint ⇒ Nuveen Virginia Municipal Bond Fund [MF] | JT | 08/30/2022 | P | \$1,001 - \$15,000 | |
| TIAA Joint ⇒ | JT | 08/31/2022 | P | \$15,001 - \$50,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|-------------|-----------------------|-------------------------------------|
| Nuveen Virginia Municipal Bond Fund [MF] | | | | | |
| TIAA Joint ⇒ Nuveen Virginia Municipal Bond Fund [MF] | JT | 12/2/2022 | S | \$100,001 - \$250,000 | <input type="checkbox"/> |
| TIAA Joint ⇒ SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC) [ST] | JT | 08/30/2022 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| TIAA Joint ⇒ SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC) [ST] | JT | 12/6/2022 | S (partial) | \$1,001 - \$15,000 | <input checked="" 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 |
|--------------------------------|--|-------------|
| Long and Foster | Spouse Commissions | N/A |
| USPJ 12Z INC | Spouse Commissions | N/A |
| Fairfax County Retirement Fund | Required Defined Benefit Distribution | \$17,225.34 |
| TIAA IRA SEP | Required Minimum Distribution - Self | \$5,911.19 |
| TIAA Retirement Trust | Required Minimum Distribution - Self | \$67,916.00 |
| TIAA Retirement Trust | Required Minimum Distribution - Spouse | N/A |

SCHEDULE D: LIABILITIES

| Owner Creditor | Date Incurred | Type | Amount of Liability |
|-----------------|---------------|-------------------------------|-----------------------|
| Bank of America | Spring 2006 | Mortgage on Primary Residence | \$100,001 - \$250,000 |
| Nelnet | 2010 | Student Loan | \$10,000 - \$15,000 |
| Nelnet | 2011 | Student Loan | \$15,001 - \$50,000 |
| Nelnet | 2012 | Student Loan | \$15,001 - \$50,000 |

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|------|--|---|
| 1995 | Fairfax County Retirement Fund Employee Plan B | Defined benefit plan managed entirely by the county |

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

- TIAA CREF - Self
- TIAA IRA - Self
- TIAA IRA - Spouse (Owner: SP)
- TIAA Joint (Owner: JT)

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. Gerald E. Connolly , 05/12/2023