



Filing ID #10042650

# 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:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/12/2021

## 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"/>	
Federal Thrift Savings Plan [MF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>	
Federal Thrift Savings Plan [MF]	SP	\$15,001 - \$50,000	None	<input type="checkbox"/>	
Fidelity 500 Index Fund [MF]		\$100,001 - \$250,000	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 Century Small Cap Select Investor [MF]	SP	\$1,001 - \$15,000	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"/>	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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"/>
Fidelity Extd Market Index Premium Class [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Freedom 2040 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Int'l Discovery [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Leveraged Company Stock [MF]		\$1,001 - \$15,000	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"/>
Fidelity Value Stock (FDVLX) [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Value Stock Fund [MF]	JT	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
ICMARC AllianzGI NFJ Dividend Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
ICMARC VT AMG TimesSquare Mid Cap Gr [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
ICMARC VT Contrafund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ICMARC VTVantagept MP Trad Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: \					
iShares MSCI EAFE ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Lord Abbett Ultra Short BD A (LUBAX) [MF]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Powershares QQQ Tr Unit Ser 1 [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Schwab - Vanguard Institutional Index I [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Schwab Dodge & Cox Stock Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Schwab -Vanguard LifeStrategy Growth Inv [MF]	SP	\$1,001 - \$15,000	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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Value Stock Fund [MF]	JT	12/30/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

\* 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
Loudoun County Public Schools	Spouse Salary	\$1,050.00

**SCHEDULE D: LIABILITIES**

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	Atlantic Union Bank (F/K/A Middleburg Bank)	October 2015	Mortgage Loan	\$50,001 - \$100,000

**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.

**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 , 08/12/2021