



Filing ID #10035602

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Suzanne Bonamici
Status: Member
State/District: OR01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 07/24/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Managed Asset Account ⇒ Goldman Sach GQG Int'l. Opptys [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ ISHARE CORE S&P Mid-Cap [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	\$50,001 - \$100,000	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Intl Value CLA [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒	JT	\$15,001 - \$50,000	Dividends	\$1,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
MFS Municipal High Inc. CLA [MF]				\$2,500	
Ameriprise Managed Asset Account ⇒ MFS Value CLA [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Small Cap Equity Strategies [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Total Return Bond Strategies [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Manager Value Strategies [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Nuveen Interm. Duration Mun. Bond CLA [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl Growth CLA [MF]	JT	None	None		<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CLA [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Short Term Municipal Bond CLA [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Michael H. Simon Beneficiary IRA at Ameriprise ⇒ Ameriprise Cash Holding [BA]	SP	None	Interest	None	<input type="checkbox"/>
Michael H. Simon Royalties ⇒ International Authors Society ("Odd Couple" Royalties) [OT]	SP	\$15,001 - \$50,000	Royalties	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Royalties from "Odd Couple" in 2018.					
Michael H. Simon Royalties ⇒ Samuel French, Inc. ("Odd Couple" Royalties) [OT]	SP	\$15,001 - \$50,000	Royalties	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Royalties from "Odd Couple" in 2018.					
Michael H. Simon Royalties ⇒ Tams-Witmark Music Library, Inc. ("Promises, Promises" Royalties) [OT]	SP	\$1,001 - \$15,000	Royalties	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Royalties from "Promises, Promises" in 2018.					
Miscellaneous Assets Jointly Owned ⇒ Ameriprise Cash Holding [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Gold Coins [OT]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Gold coins.					
Miscellaneous Assets Jointly Owned ⇒ Northwestern Mutual Life Ins. (life ins. cash value) [OT]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Cash value of Northwestern Mutual Life Insurance policy.					
Miscellaneous Assets Jointly Owned ⇒ Oregon State Dept. of Admin. Services, Municipal Bond [CS]	JT	None	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Oregon State Department of Administrative Services Municipal Bond.					
Miscellaneous Assets Jointly Owned ⇒ U.S. Bank NA (checking and savings accounts) [BA]	JT	\$500,001 - \$1,000,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Suzanne's Personal Assets ⇒ Franklin Growth Alloc. CLA mutual fund (held in Suzanne's personal IRA at Ameriprise) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Suzanne's Personal Assets ⇒ OnPoint Community Credit Union (check and savings) [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index mutual fund [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Interm. Term Corp. Bond Inndex [MF]	SP	\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP mutual fund [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard REIT Index mutual fund [MF]	SP	None	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: [Asset sold entirely on 12/30/19]					
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Small Cap Index mutual fund [MF]	SP	None	Dividends	\$2,501 - \$5,000	<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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF]	JT	02/15/2019	P	\$50,001 - \$100,000	
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF]	JT	05/16/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ ISHARES CORE S&P Mid-Cap [MF]	JT	05/16/2019	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [MF]	JT	05/16/2019	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	02/15/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	05/16/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF]	JT	05/16/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF]	JT	05/16/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Intl. Value CLA [MF]	JT	05/16/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value CLA [MF]	JT	02/15/2019	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Small Cap Equity Strategies [MF]	JT	05/16/2019	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Manager Value Strategies [MF]	JT	02/15/2019	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Nuveen Interm. Duration Mun. Bond CLA [MF]	JT	05/16/2019	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Oppenheimer Intl. Growth CLA [MF]	JT	02/15/2019	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CLA [MF]	JT	02/15/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Emerging Markets Equity CLA [MF]	JT	05/16/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Wells Fargo Advantage Short Term Municipal Bond CLA [MF]	JT	05/16/2019	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate Term Municipal CLA [MF]	JT	05/16/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Michael H. Simon Beneficiary IRA at Ameriprise ⇒ Ameriprise Cash Holding (Ben. IRA) [IR] DESCRIPTION: [Distribution]	SP	02/15/2019	E	\$15,001 - \$50,000	
Miscellaneous Assets Jointly Owned ⇒ Oregon State Dept. of Admin. Services, Municipal Bond ⇒ Oregon State Dept. of Admin. Services, Municipal Bond [OT] LOCATION: US DESCRIPTION: [Redemption]	JT	11/1/2019	E	\$15,001 - \$50,000	
Miscellaneous Assets Jointly Owned ⇒ Oregon State Dept. of Admin. Services, Municipal Bond ⇒ Oregon State Dept. of Admin. Services, Municipal Bond [OT] LOCATION: US DESCRIPTION: [Redemption]	JT	11/5/2019	E	\$50,001 - \$100,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Inter. Term Corp. Bond Index [MF]	SP	12/30/2019	P	\$500,001 - \$1,000,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP mutual fund [MF]	SP	01/14/2019	P	\$15,001 - \$50,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard REIT Index mutual fund [MF]	SP	01/14/2019	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒	SP	12/30/2019	S	\$100,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard REIT Index mutual fund [MF]				\$250,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Small Cap Index mutual fund [MF]	SP	12/30/2019	S	\$250,001 - \$500,000	<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

None disclosed.

SCHEDULE D: LIABILITIES

None disclosed.

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

- Ameriprise Managed Asset Account (Owner: JT)
LOCATION: US
- Michael H. Simon Beneficiary IRA at Ameriprise (Owner: SP)
LOCATION: US
- Michael H. Simon Royalties (Owner: SP)
LOCATION: US
- Miscellaneous Assets Jointly Owned (Owner: JT)
LOCATION: US
- Miscellaneous Assets Jointly Owned ⇒ Oregon State Dept. of Admin. Services, Municipal Bond (Owner: JT)

- Suzanne's Personal Assets
LOCATION: US
- The Michael H. Simon Rollover IRA at Vanguard (Owner: SP)
LOCATION: US

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. Suzanne Bonamici , 07/24/2020